

2001

Mercer Compensation Background 1994-2001

Bowling Green State University. Administrative Staff Council

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Notes

1. Poor Photocopies

**Draft of Administrative Staff Council Response
to 10-12-95 Document from the Vice Presidents**

Prepared by

**ASC Executive Committee and
ASC Personnel Welfare Committee**

Contents

- 1) Cover Memorandum**
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Date

February 26, 1996

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Cover Memorandum (Draft)

To: Les Barber, Executive Assistant to the President Final Date
Eloise Clark, VP for Academic Affairs (Current Date =
Chris Dalton, VP for Planning and Budgeting February 26, 1996)
Nancy Footer, General Counsel
Robert Martin, VP for Operations
Phil Mason, VP for University Relations
John Moore, Assistant VP for Human Resources
Sidney Ribeau, President

From: Administrative Staff Council

Subject: Response to the Vice President Council's Administrative Staff
Compensation Policy Document

As you requested, attached are Administrative Staff Council's responses to the enclosed Vice President Council's Administrative Staff Compensation Policy document dated October 12, 1995. You will note that Administrative Staff Council has responded to each of the 18 items that were presented.

Because the University is in the process of revising Administrative Staff Position Analysis and Compensation Policies, it is imperative that we include all policies related to staff compensation. Therefore, the response includes our recommendations for items (6 additional) not discussed in the original document but essential to future policies and procedures for Administrative Staff. The majority of our recommendations are based on the Discussion Guide on the Development of Policies and Procedures presented by Mercer for Bowling Green State University, March 1995. We look forward to working with you on these policies and procedures.

DRAFT

CONFIDENTIAL

ADMINISTRATIVE STAFF COMPENSATION
VP COUNCIL - 10-12-95

Attending: Martin, Mason, Dalton, Clark, Barber, Footer

1. It was agreed that "Full Disclosure" of processes and study results was desirable within the bounds of customary personal data limitations. Forms describing the rating factors and their associated points, the formulas for extending the ratings to total points, Point ranges assigned to each grade, and salary ranges for each grade will be made available. Job Factor Ratings and total points assigned for each position can also be reviewed in the Personnel Office and will be made available to departmental offices.
2. The appeal process will be expanded to include an administrative staff appeal committee appointed by ASC.
 - A. Members will include one representative each from every Vice Presidential Area, Office of the President (ICA suggested), and two representatives from Academic Affairs.
 - B. Members should not include those having filed appeals.
 - C. Members should not have been previously assigned to the Advisory Committee for the Mercer Study.
3. Agreed that additional training should be offered to administrative staff employees and supervisors/managers covering the methods, forms and formulas used to extend job factor ratings to total points and grades. Personnel to schedule, advertise and conduct within next two weeks.
4. Agreed that information needs to be distributed describing the three different groups involved in the rating/grading process emphasizing that they were all part of a sequence of steps to arrive at a final grade for each position. The results of each step for a particular employee would be made available to that employee should he/she seek that information. Since each evaluation was a collective process, written rationale for the results of each step is not available. Further emphasis was recommended in informing employees that the results of intermediate steps in no way affected their appeal process or its consequences. The final step was the step from which appeal information should be presented.
5. The restrictions included in the instructions on the appeal form may be overly restrictive. If additional space is needed to present information that is essential to the basis for the appeal, the reverse side of both pages one and two of the appeal form can be used. A revised Position Questionnaire is also acceptable.
6. The positions that were not included in the original analysis should be graded by Personnel Services as soon as time is available utilizing the questionnaire and supervisory/vice president reviews similar to the original process. Grade/Rating recommendations would be forwarded to the Area VP then VP Council. The resulting recommendation would be returned to the employee for an appeal opportunity.

Additional information submitted through the appeal process would follow the same steps as the original appeal process for all first time submissions within six months of the implementation date adopted by the Board of Trustees. Appeals submitted subsequent to the six month period would follow policies adopted as a part of the Compensation Plan.

7. Administrative positions normally held by individuals on faculty contracts are excluded from rating/grading by the Administrative Staff Compensation Plan. Administrative positions currently held by individuals on faculty contracts which could be assigned to administrative positions in the future will not be rated/graded until such time as that position is expected to become vacant and replacement with administrative contract employee is begun.
- ✓ 8. If an employee's salary is below the minimum for the assigned grade, it will be adjusted to the minimum effective Jan. 1, 1996.
- ✓ 9. No current employee's salary will be capped as a result of the implementation of the Compensation Study.
- ✓ 10. An individual employee's salary will be adjusted annually through the usual procedure with across the board and merit raises, if applicable, as approved by the Board of Trustees.
- ⑪. It is the intent of the University that adoption of this compensation plan will normally result in new employees at the minimum salary for the appropriate grade. Variances from this practice based on special departmental needs, market factors, individual qualification, etc., may be approved by area vice presidents after consultation with the Offices of Personnel and Affirmative Action.
12. In the event that significant changes in duties and responsibilities occur, an individual may initiate a request for reevaluation of their position. A revised questionnaire will be submitted through the same process as existed during the initial phase of the project. Management reviews, personnel grading and appeal processes will be the same as those submitted subsequent to the six month post implementation period.
 - A. If a higher grade results, the salary will be adjusted to the minimum of the new grade or an increase of 5% whichever is greater.
 - B. If a higher grade does not result, no salary adjustment will occur.
13. If an employee is promoted to a position in a higher grade, the salary will be adjusted to the minimum of the new grade or a 5% increase, whichever is greater.
14. All appeals are initiated by submitting a new Position Questionnaire to the immediate supervisor, then to the department/division/unit heads then to Personnel Services.
 - A. Initial appeals submitted during implementation or within six months thereafter are forwarded to the ASC Appeal Committee then the area VP and finally the VP Council for final determination.
 - B. Appeals submitted after the above periods are forwarded from Personnel Services to the area VP for final determination.
15. Title revision will not be included as a part of the implementation of the Compensation Study at this time.

16. When new positions are created or existing positions become vacant, revised questionnaires, if appropriate will be prepared by management and submitted to Personnel for grading.

A. During initial implementation plus six months, Personnel will forward grade recommendations to the area VP, through the ASC Appeal Committee, then to VP Council for final determination

B. After the above period Personnel will forward grade recommendations to the area VP for final determination.

✓ 17. The Administrative Staff Compensation Plan Grade/Salary chart will be reviewed at least every 5 years by the Personnel Services Department to determine its adequacy in meeting market equity. These reviews will be patterned after guidelines provided in the final report from Mercer Inc. and adjustments made as results dictate in minimum, mid-range, and maximum pays for each grade. Annual adjustments to these pay charts will not be automatically made based on annual Board of Trustee approved employee pay increases.

18. When employees are assigned to positions in a higher grade on an interim/temporary/acting basis, a salary increase will be established by the area VP after consultation with the Offices of Personnel and Affirmative Action.

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ADMINISTRATIVE STAFF COUNCIL RESPONSE - FINAL DATE
SUMMATION OF POINTS
(current date = February 26, 1996)

| <u>Point #</u> | <u>Description</u> | <u>Status</u> |
|----------------|----------------------------------------------|---------------------------------|
| 1 | Full disclosure | Accomplished |
| 2 | Appeals process | In-progress |
| 3 | Additional training | Accomplished |
| 4 | Additional information | Accomplished |
| 5 | Appeals form | Accomplished |
| 6 | Positions not in original study | In-progress |
| 7 | Administrative positions on faculty contract | Agreement |
| 8 | Pay below the minimum | Agreement and Recommendation |
| 9 | Salary caps | Agreement and Recommendation |
| 10 | Annual salary adjustments | Agreement |
| 11 | New employees hired at the minimum | Disagreement and Recommendation |
| 12 | Position Reevaluation | Disagreement and Recommendation |
| 13 | Promotion | Disagreement and Recommendation |
| 14 | Appeals Process vs. Position Reevaluation | Disagreement and Recommendation |
| 15 | Titles | Agreement and Recommendation |
| 16 | Position Evaluation Process | Disagreement and Recommendation |
| 17 | Review of Grade/Salary Chart | Disagreement and Recommendation |
| 18 | Interim/Temporary/Acting Appointments | Disagreement and Recommendation |

NEW POINTS

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| | | |
|----|------------------------------------|---------------|
| 19 | Progression Through a Salary Level | New Procedure |
| 20 | Upgrade to Another Salary Level | New Procedure |
| 21 | Demotion | New Procedure |
| 22 | Downgrade | New Procedure |
| 23 | Transfer | New Procedure |
| 24 | Market Exceptions | New Procedure |

ADMINISTRATIVE STAFF COUNCIL RESPONSE - FINAL DATE
(current date = February 26, 1996)

Administrative Staff Council has been working on responses to the ADMINISTRATIVE STAFF COMPENSATION VP COUNCIL document dated October 12, 1995. As a result of feedback from Administrative Staff Council, several of the points presented in your draft have been addressed --points 1, 2, 3, 4, and 5 (full disclosure, appeals process, additional training, additional information, and appeals form). We appreciate the cooperation of the administration in expediting this part of the process. *already*

The balance of this document addresses points 6 through 18 and contains our recommendations. In addition, we have included points 19 through 24 that are essential in completing a comprehensive revised Administrative Staff Handbook. The majority of our recommendations are based on the Discussion Guide on the Development of Policies and Procedures presented by Mercer for Bowling Green State University, March 1995. The Administrative Staff Council looks forward to working with you on these policies and procedures.

ADMINISTRATIVE STAFF COMPENSATION
VP COUNCIL - 10-12-95

Attending: Martin, Mason, Dalton, Clark, Barber, Footer

1. It was agreed that "Full Disclosure" of processes and study results was desirable within the bounds of customary personal data limitations. Forms describing the rating factors and their associated points, the formulas for extending the ratings to total points, Point ranges assigned to each grade, and salary ranges for each grade will be made available. Job Factor Ratings and total points assigned for each position can also be reviewed in the Personnel Office and will be made available to departmental offices.

ASC Response -Thank you for opening up the channels of communication regarding full disclosure. We hope the full disclosure concept will be carried forward through the appeals process and thereafter.

2. The appeal process will be expanded to include an administrative staff appeal committee appointed by ASC.

- A. Members will include one representative each from every Vice Presidential Area, Office of the President (ICA suggested), and two representatives from Academic Affairs.
- B. Members should not include those having filed appeals.
- C. Members should not have been previously assigned to the Advisory Committee for the Mercer Study.

ASC Response-We have identified members to serve on the appeals committee, and we developed the ASC APPEALS COMMITTEE POLICY STATEMENT and the ASC APPEALS COMMITTEE FORM for committee members to follow.

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3. Agreed that additional training should be offered to administrative staff employees and supervisors/managers covering the methods, forms and formulas used to extend job factor ratings to total points and grades. Personnel to schedule, advertise and conduct within next two weeks.

ASC Response-Thank you for holding the informational sessions.

4. Agreed that information needs to be distributed describing the three different groups involved in the rating/grading process emphasizing that they were all part of a sequence of steps to arrive at a final grade for each position. The results of each step for a particular employee would be made available to that employee should he/she seek that information. Since each evaluation was a collective process, written rationale for the results of each step is not available. Further emphasis was recommended in informing employees that the results of intermediate steps in no way affected their appeal process or its consequences. The final step was the step from which appeal information should be presented.

ASC Response-The Progression of Levels document was helpful to people in preparing their appeals, but some of the data was inaccurate and the column titles were misleading. For example, the first column entitled Mercer led staff to believe that the entire column had been determined by Mercer consultants. Also, the second column entitled Committee implied that the Committee reviewed all positions which was not the case.

5. The restrictions included in the instructions on the appeal form may be overly restrictive. If additional space is needed to present information that is essential to the basis for the appeal, the reverse side of both pages one and two of the appeal form can be used. A revised Position Questionnaire is also acceptable.

ASC Response-Additional space was helpful to those appealing, but the approach of submitting a revised Position Questionnaire is beyond the scope of the original intent of the appeals process. Originally, Position Questionnaires are to be used only when a position is to be reevaluated.

6. The positions that were not included in the original analysis should be graded by Personnel Services as soon as time is available utilizing the questionnaire and supervisory/vice president reviews similar to the original process. Grade/Rating recommendations would be forwarded to the Area VP then VP Council. The resulting recommendation would be returned to the employee for an appeal opportunity. Additional information submitted through the appeal process would follow the same steps as the original appeal process for all first time submissions within six months of the implementation date adopted by the Board of Trustees. Appeals submitted subsequent to the six month period would follow policies adopted as a part of the Compensation Plan.

ASC Response-We seek clarification of the status of positions that were not included in the original analysis. Those positions that have not been analyzed yet should be completed immediately. The people in these positions have still not been notified as of February 21, 1996. Any administrative staff position not included in the original analysis should be given the same appeal opportunity as those included in the original study. Anyone who desires to appeal must do so within 30 days of receipt of notification of their grade level from Personnel. The Appeals Committee will remain intact for a reasonable period of time that is yet to be determined by Personnel, the administration, and Administrative Staff

Council. Once the Appeals process has been completed, the Position Reevaluation process will begin as outlined in point 12.

7. Administrative positions normally held by individuals on faculty contracts are excluded from rating/grading by the Administrative Staff Compensation Plan. Administrative positions currently held by individuals on faculty contracts which could be assigned to administrative positions in the future will not be rated/graded until such time as that position is expected to become vacant and replacement with administrative contract employee is begun.

ASC Response-This seems logical, and it is our belief that rating/grading of positions in the future by Personnel will add consistency to this system as it evolves.

- ✓ 8. If an employee's salary is below the minimum for the assigned grade, it will be adjusted to the minimum effective Jan. 1, 1996.

ASC Response-We agree whole-heartedly. In addition, we believe those positions that fall between the minimum and the midpoint need to be carefully examined for possible salary inequity/discrimination. The Mercer consultants indicated that progression from minimum to midpoint should typically take four to seven years.

- ✓ 9. No current employee's salary will be capped as a result of the implementation of the Compensation Study.

ASC Response-Not only should no current employee's salary be capped; it is our recommendation that no future administrative staff employee's salary should be capped.

- ✓ 10. An individual employee's salary will be adjusted annually through the usual procedure with across the board and merit raises, if applicable, as approved by the Board of Trustees.

ASC Response-We agree.

11. It is the intent of the University that adoption of this compensation plan will normally result in new employees at the minimum salary for the appropriate grade. Variances from this practice based on special departmental needs, market factors, individual qualification, etc., may be approved by area vice presidents after consultation with the Offices of Personnel and Affirmative Action.

ASC Response-If the intent of the University is to hire new employees at the minimum, BGSU runs the risk of developing a pool of applicants that will be lacking in both quantity and quality. New positions should be posted with a salary range from minimum to midpoint. Anything above the midpoint should be considered a variance needing vice presidential approval after consultation with the Offices of Personnel Services and Affirmative Action.

12. In the event that significant changes in duties and responsibilities occur, individuals may initiate a request for reevaluation of their position. A revised questionnaire will be

submitted through the same process as existed during the initial phase of the project. Management reviews, personnel grading and appeal processes will be the same as those submitted subsequent to the six month post implementation period.

- A. If a higher grade results, the salary will be adjusted to the minimum of the new grade or an increase of 5% whichever is greater.
- B. If a higher grade does not result, no salary adjustment will occur.

ASC Response - We recommend the implementation of the following procedures for position reevaluation. In addition, we concur with the Mercer consultants recommendation that the standard adjustment for significant changes in duties and responsibilities should be 10 percent.

Definition of Position Reevaluation: the formal review of positions at designated intervals for purposes of ensuring that current duties and responsibilities are being appropriately reflected in the position's salary level.

Recommendation:

Positions can be reevaluated within each department upon the request of the incumbent or supervisor, but also all positions will be reviewed regardless of request at least once every four years. Review of one quarter of the positions per year would include all of the employee or supervisor initiated requests for reevaluation.

Process For Reevaluation at Request of Employee or Supervisor

1. Once a year, at any time, an employee or supervisor may request an evaluation of a position to ensure the current duties and responsibilities are appropriately reflected in the position's salary level.
2. A memorandum and completed position analysis form should be forwarded to Personnel Services for evaluation based on the established guidelines.
3. Personnel Services will review the position within 30 days based on the established criteria. If there are questions about the position, Personnel Services can request an interview with the employee and the immediate supervisor.
4. Personnel Services will forward the results of the analysis to the employee, the supervisor and department head, dean or director and vice president regardless of who initiated the request.

Process For Personnel Initiated Reevaluation

1. Personnel Services should establish a system to evaluate one quarter of the positions each year.
2. Employees in those positions to be evaluated will be asked to complete a position analysis form within a 30-day period.

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3. These positions will be reviewed by Personnel within 30 days, and the results of the review will be forwarded to the employee and supervisor, dean, director and vice president.

Process For Both Situations Above

1. Positions which are determined by Personnel to fall in a lower salary level due to decreased responsibilities may be appealed by either the supervisor or the appellant. Salaries will remain the same. (See Downgrade policy)

2. Positions determined by Personnel to fall in a higher salary level should receive the increase in salary in the subsequent pay following Personnel's completion of the review.

13. If an employee is promoted to a position in a higher grade, the salary will be adjusted to the minimum of the new grade or a 5% increase, whichever is greater.

ASC Response - We agree that when an employee is promoted there should be a salary increase; however, the increase should be based on 10 percent or should be based on fair market value whichever is greater.

Definition of Promotion: occurs when an incumbent moves from a position requiring a certain level of skill, effort and responsibility to a vacant or newly created position at a higher salary level requiring a significantly greater degree of skill, effort and responsibility.

14. All appeals are initiated by submitting a new Position Questionnaire to the immediate supervisor, then to the department/division/unit heads then to Personnel Services.

A. Initial appeals submitted during implementation or within six months thereafter are forwarded to the ASC Appeal Committee then the area VP and finally the VP Council for final determination.

B. Appeals submitted after the above periods are forwarded from Personnel Services to the area VP for final determination.

ASC Response: The current appeals process is for transitional purposes only. In the future, individuals will follow the procedures for position reevaluation as outlined in point 12.

15. Title revision will not be included as a part of the implementation of the Compensation Study at this time.

ASC Response - We agree. However in the future when a title change is requested, the position would be reevaluated; and if necessary, the title would be adjusted to reflect the duties and responsibilities of the position. Even when a major divisional reorganization occurs, the position reevaluation process as outlined in point 12 should be followed.

16. When new positions are created or existing positions become vacant, revised questionnaires, if appropriate will be prepared by management and submitted to Personnel for grading.

A. During initial implementation plus six months, Personnel will forward grade recommendations to the area VP, through the ASC Appeal Committee, then to VP Council for final determination

B. After the above period Personnel will forward grade recommendations to the area VP for final determination.

ASC Response - We recommend the implementation of the following procedures for position evaluation.

Definition of Position Evaluation Process: the method whereby vacant or newly established positions are evaluated and assigned to salary levels to establish equity within the organization.

Recommendation:

Evaluations of positions will be handled by Personnel Services in consultation with the hiring official.

Process:

1. When a position becomes vacant or is newly created, the hiring official meets with Personnel Services to review the position responsibilities for accuracy of placement in a salary range and title. Any corrections should be made at this time.

2. The hiring official should be advised at this time of the appropriate salary range for the position.

3. The Position Opening Request & Authorization (PORA) form should be routed as usual. Any recommended changes to the position from a dean, director or vice president should be discussed with Personnel Services and the hiring official to reach consensus prior to the posting of the position.

✓ **17. The Administrative Staff Compensation Plan Grade/Salary chart will be reviewed at least every 5 years by the Personnel Services Department to determine its adequacy in meeting market equity. These reviews will be patterned after guidelines provided in the final report from Mercer Inc. and adjustments made as results dictate in minimum, mid-range, and maximum pays for each grade. Annual adjustments to these pay charts will not be automatically made based on annual Board of Trustee approved employee pay increases.** ✓

ASC Response: We believe that administrative staff should not be penalized by a review of the Grade/Salary chart every 5 years instead of an annual review. We believe that the Grade/Salary chart should be adjusted each year that there is to be a general salary increase. This is necessary so that administrative salary levels are raised in an amount equivalent to the other constituent groups' increases each year.

18. When employees are assigned to positions in a higher grade on an interim/temporary/acting basis, a salary increase will be established by the area VP after consultation with the Offices of Personnel and Affirmative Action.

ASC Response: We recommend the implementation of the following procedures for interim/temporary/acting appointments.

Definition of Temporary Upgrade/Interim Appointment: occurs when an administrative staff member is asked to serve any period longer than 4 weeks in a position which has a higher salary level

Recommendation:

Increase salary by 10 percent or to the minimum of the temporary salary level, whichever is greater.

At the end of the appointment the employee will return to his/her original salary plus any raises received during the time of the temporary appointment.

After 26 weeks Personnel Services will review the arrangements.

Although the following points were not included in the original ADMINISTRATIVE STAFF COMPENSATION VP COUNCIL document dated October 12, 1995, the inclusion of these policies and procedures in the revised Administrative Staff Council Handbook are essential. Once again, these recommendations are based on the Discussion Guide on the Development of Policies and Procedures presented by Mercer for Bowling Green State University, March 1995.

19. Progression Through a Salary Level

Recommendation:

Progression through a salary level is an important issue that is under review by the Administrative Staff Council's Salary Committee and Personnel Welfare Committee in consultation with Personnel Services. Recommendations will be forthcoming.

20. Upgrade to Another Salary Level

Definition of Upgrade to Another Salary Level: occurs when a position is reevaluated resulting in a higher salary level as a result of a significant expansion in the position's existing duties and responsibilities.

Recommendation:

Increase salary by ten percent or to the minimum of the new salary level, whichever is greater.

21. Demotion - Definition of Demotion: occurs when an incumbent moves from a position requiring a certain level of skill, effort and responsibility to a vacant or newly created position assigned to a lower salary level requiring a significantly lesser degree of skill, effort and responsibility.

Recommendations:

Demotion is an issue that will be reviewed by the Administrative Staff Council's Personnel Welfare Committee in consultation with Personnel Services. Recommendations will be forthcoming.

22. Downgrade - Definition of Downgrade: occurs when a position is reassigned to a lower salary level as a result of a significant reduction in the position's existing duties and responsibilities.

Recommendation:

Maintain incumbent's current pay.

23. Transfer - Definition of Transfer: a lateral move which results when an employee is moved from a position requiring a certain level of skill, effort and responsibility to another position requiring the same degree of skill, effort and responsibility and assigned to the same salary level.

Recommendation:

Maintain incumbent's current pay.

24. Market Exceptions - Definition: A special premium which is established for a particular job title when unusual market conditions exist causing excessive turnover, salary level midpoints well below market average, and/or failure of current pay to attract qualified candidates.

Recommendation:

Move the pay range upward (i.e. minimum, midpoint and maximum) by a percentage equal or comparable to the percentage difference between the documented market average pay for the job and its current midpoint value; subject to periodic review to determine appropriateness of premium.

Personnel Services will determine if market exceptions exist and conduct the review process.



Bowling Green State University

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W. Mercer

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Phone: (419) 372-2211
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September 13, 1996

MEMORANDUM

TO: ALL BGSU ADMINISTRATIVE STAFF MEMBERS

FROM: Sidney A. Ribeau, President *Sidney Ribeau*

RE: Our New Administrative Staff Compensation Plan

I realize that this message may not reach you for several days because of the complicated logistics required for mailings to large numbers of people, but immediately after our Board of Trustees' meeting today, I write to inform you that the Trustees have adopted the Administrative Staff Compensation Plan. A copy of the basic policies associated with the Plan is attached.

A few comments of my own may be helpful. We have traveled a long and many times arduous road on this "Mercer" journey. However, I think we can now all have pride in the fact that together we have taken this important step forward in assuring that salaries for administrative staff are established and maintained in a fair and equitable manner.

It is extremely pleasing to note that the plan is already having a salutatory effect in setting appropriate, equitable entry-level salaries for new hires. It is also very gratifying to know that, effective with their October 1996 paychecks, individuals whose salaries are below the minimums for their new grades will have the planned salary adjustments made, retroactive from January 1, 1996.

I do know, of course, that some of you remain deeply concerned about certain aspects of this plan which the Trustees have now adopted. The leadership of Administrative Staff Council has made this clear to us, as have some of you individually. The chair and chair-elect of ASC have particularly stressed two policy areas in discussions with the administration and the Trustees. I would like to comment briefly on each of them.

- 1) Many of you would like to see a higher guaranteed salary increase for individual staff members who are promoted, temporarily reassigned or reevaluated to a higher grade. The plan guarantees at least 5%, while ASC recommended 10%. The qualifying phrase "at least" is very significant in this context. In the designated circumstances, no salary increase will be less than 5%, but many will be higher, I'm sure, depending on the individual's new responsibilities. Some may be as much as 10% or more, if there are substantial increases in responsibility associated with the new grade and if an affected individual is a person of superior talent and merit.

- 2) Many of you also continue to be concerned about the so-called "caps" policy. The administration and Trustees have been told, for example, that only the administrative staff is being singled out with a restrictive salary policy. This is not true. The salaries of **all** employee groups are restricted in some way, either related to plan design or to market. While it may be true that a very small number of administrative staff could have their salaries temporarily frozen, after the three exemption years, administrative staff members who are highly motivated, skilled and efficient may earn substantial numbers of merit dollars over a period of years. While faculty members also earn merit dollars in the same way, their salaries are always constrained by market forces. Also, of course, in the classified staff salary plan, members cannot earn more than the percentage amounts designated in their annual salary pools.

It is vital that we be honest about our goals. We have established a compensation plan to help guarantee equitable salaries for administrative staff members. If we were to exempt some staff members permanently from the terms of the plan, allowing their salaries to advance beyond the grade maximums--whether by increases to base salary or by bonuses--we would not have an equitable plan. By definition, in that case, we would be guaranteeing some individuals an inequitable advantage over all the rest. We cannot afford to begin our new plan that way.

In addition, I want you to know that I am committed to the position that professional development opportunities and training must be available to our staff. Such opportunities will help mitigate the possible negative effects of salary grade maximums.

As two or three of the Trustees said during the meeting this morning, we now have a plan officially in place, but the details of that plan are not cast in stone. Experience may move us to make changes. We will continue to listen carefully to comments and recommendations from ASC and its leadership. If fine tuning of the plan is needed, I'm confident that it will happen.

I believe that with the help and hard work of many individuals--members of the university administration as well as administrative staff members--BGSU is now positioned to meet some of the difficult challenges facing us both internally and externally. Thanks to all of you who have assisted. The Trustees and I are grateful. We look forward to walking forward together with you on the new road which now lies ahead of us.

ADMINISTRATIVE STAFF COMPENSATION PLAN: RELATED POLICIES

1. Administrative staff members whose salaries are below minimum for grade will have their salaries brought up to minimum. The process by which that will be done is as follows.
 - (a) 1995-96 salaries for all individuals below the minimum for grade, based on the 1995-96 salary table, will be adjusted upward to the minimum, retroactive from January 1, 1996. Salary raises for 1996-97 will then be recalculated and moved upward, based on the adjusted '95-96 salary.
 - (b) A second salary table, time-adjusted for 1996-97, has now been constructed, based on recommendations from Mercer Inc. Individuals whose '96-97 salaries are still below minimum for grade on this new table will be brought up to the grade minimum, retroactive from July 1, 1996.
2. In general, Position Request and Authorization forms for administrative staff new hires will specify salaries with a range from the grade minimum to the midpoint. Listing a salary level higher than the midpoint for grade will require prior approval by the area vice president, after consultation with the offices of Human Resources and Affirmative Action.
3. In the event that a higher grade placement for an administrative staff member results from a revised position analysis, that person is guaranteed at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.
4. If an administrative staff member is promoted to a different position in a higher grade, that person is guaranteed at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.
5. When an administrative staff member is assigned to a position in a higher grade on an interim/temporary/acting basis, the following salary adjustment policy will apply. If the person's service in the new position is longer than 30 calendar days, s/he will receive a premium for the time served equal to at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.
6. In cases where an administrative staff member is demoted to a position in a lower grade, the person's salary will be lowered to a level in the new grade equivalent to his/her level in the original one.
7. In cases where an administrative staff member is transferred, in a lateral move, to another position at the same grade level and requiring approximately the same degree of skill, effort and responsibility, normally the individual's salary will not be adjusted.
8. A special market premium may be established for a particular job title when market conditions exist causing excessive turnover, when a salary level midpoint is well below market average for the job and/or when there is a failure of a current salary range to attract qualified candidates.
9. Beginning in 1997-98, the ranges for each grade will be adjusted in a three-year, recurring cycle. In the first two years of each cycle, the ranges for each grade will move up annually by an amount which is 1% less than the average salary increment paid to administrative staff that year. Every third year, beginning with 1999-2000, the University will conduct a reevaluation of the ranges in light of current market conditions, as well as other relevant factors, and adjust the ranges in light of that reevaluation.
10. BGSU will enforce salary maximums for all administrative staff positions, but it will exempt from the caps for a period of three years those administrative staff employees whose salaries are already above the maximums for their grades. Effective July 1, 2000, the salaries of any staff members still above their maximums will be frozen until such time as those salaries are within range. If at any time during the three years a staff member's salary should fall within range, the exemption ceases to apply to that individual and the maximum will be enforced.

Approved by the Board of Trustees
September 13, 1996



Bowling Green State University

Administrative Staff Council

February 14, 2001

To: President's Compensation Working Group

From: Administrative Staff Council

Re: Philosophy of Compensation

Thank you for the invitation to meet with the President's compensation group. The Administrative Staff Council (ASC) leadership has decided to provide for you some of our thoughts about compensation so that you may be able to discuss them prior to or at that meeting.

We fully support the language from and the intent of our handbook: "A salary system should be designed to promote internal salary equity (based upon the Administrative Staff Compensation Plan) as well as external salary equity (based upon salary comparisons among individuals in similar positions from similar universities, colleges, or departments). The institution should monitor and ensure that employees salaries continue to be commensurate with individual employee's skills, abilities, and experience."

Again from our handbook: "Each year, the university should identify, review, and address employee salaries, which may be inequitable. Funds should be made available on a regular, on-going basis to correct salary inequities, make market adjustments and salary adjustments deemed appropriate following comprehensive reviews of employee performance and salary, and to support raises for promotions. These funds should not be considered part of the annual merit pool." Administrative Staff at Bowling Green believe that an open, visible process for salary/market adjustments must be accessible to individuals. As well, compensation for upgrades should not depend on the vagaries of the availability of departmental funds.

Regarding the growing work week, we also believe that positions of professional administration at BGSU should be designed and articulated to be performed typically within the forty-hour work week. As our handbook states, "Under normal circumstances, a full-time administrative staff member is expected to work a minimum of 40 hours per week. There may be occasions beyond the 40 hours in order to fulfill the contracted obligations. ...When an administrative staff member's normal duties perpetually require work beyond the 40 hour week, it is assumed that this situation will be taken in account in the employee's overall compensation and that the employee will be given the opportunity for a variable work schedule." With increased enrollment and a consistent flow of administrative employee turnover, longer and longer work weeks are becoming endemic to the administrative staff positions at BGSU. For the well-being of both employees and institution, this fact must be appropriately addressed, although not solely via compensation.

The concept of merit is not foreign or unwelcome to administrative staff, however, a viable merit pool is a

necessary part of an incentive program. First, no employee who satisfactorily performs the duties articulated in her/his job description should be penalized for working at BGSU because of external economic growth. Thus, meritorious Administrative Staff should be assured that each contract will at minimum provide the same indexed purchasing power as the previous year's contract. Second, compression and inversion problems created by the implementation of our compensation plan must be addressed to assure equity. When merit barely meets or does not meet annual increases in cost of living, meritorious administrative employees in the upper quadrants of their pay ranges cannot be expected to remain stagnant or to fall back in real purchasing power. And equally, merit pools or compensation plans that do not allow for timely progression toward range midpoints surely hurt the morale and retention of administrative staff in the lower quadrants of their pay ranges.

Administrative Staff at BGSU hope the President's Compensation Group will recognize several additional tenets of successful plans for professional compensation. One such tenet is that successful performance by one individual is usually based on a complex inter-dependency of competencies of support by many others. Another tenet is that the relationship between the employer and staff member is one of mutual benefit which should carry increased care and responsibility over years of service. This would include attempts to place and retrain staff who through no failure of performance on their part may be forced from an administrative position after five or more years of service.

We also feel strongly that caps are detrimental to the morale and in opposition to the philosophy of a merit-based compensation system. As a university, the value communicated to individuals who have performed at high levels over the course of their careers at BGSU and who now have reached the top of their established salary range is that the university no longer cares about that individual's performance or is taking that employee's satisfaction, performance, and retention for granted. In addition, the policy of imposing salary caps to only one employee group of the three is systematically unfair.

All staff groups within a single institution should have the same general principles guiding their compensation.

Other areas of compensation or suggestions for compensation that we consider valuable include the following items:

- Administrative staff members who have performed well for a minimum of five years and whose position is in no imminent danger of deletion should be provided multiple-year contracts.
- Administrative Staff should have some reasonable expectation/guidelines as to how they are going to progress through the pay range in their current position and how they might progress, if they desire to do so, in an upward career path within the institution. The present projection of time from minimum-wage (for range) hire-in to range midpoint is 22.2 years, and even hire-ins at first quartile take far longer to reach range midpoint than the expected time in position to reach full proficiency or productivity. This angle of ascent in compensation is much too shallow to suggest retention in position beyond 2-5 years; if institutional resources do not permit lower-quadrant acceleration, we should develop formal processes to encourage upward mobility within the university.
- In the interest of supporting each other in this community, a catastrophic leave pool should be established. Appropriate regulations to prevent abuse of a system could be developed.

- As an incentive toward productivity, a higher percentage of sick leave should be paid out at retirement.
- Given the growing work week and work load of many staff, it is difficult for some individuals to find time in which to take vacation. Currently, at a given point in the year, any hours accumulated over the allowed 44 days are lost. The university should consider paying the individual for those days or removing the cap on administrative vacation accrual. The paradox of too much responsibility to take vacation and the loss of this benefit through too much commitment to the institution must be eliminated. Compounding the problem, every time we lose an administrative employee because our working conditions or compensation are not market-competitive, the employees who remain in that employee's unit are likely to realize an immediate downturn in their working conditions--just one example of which is the loss of accrued vacation time.
- Currently, when a position is re-evaluated and assigned a higher level as a result of a significant expansion in the position's existing duties and responsibilities, the incumbent is guaranteed at least a 5% minimum increase in salary or the minimum of the new level. To remain competitive and to reward those who assume additional responsibility, salary should be increased a minimum of 10% and negotiated with the consideration of years of experience, etc. as a condition--as they would be with a new hire.

COMPENSATION AND MERCER - Administrative Staff at BGSU

May 1993

ASC Exec met with a Mercer rep re: proposed consulting project to study administrative staff positions, titles and compensation

Exec asked Ad Council – after individuals have been identified who need market or salary equity adjustments, if it is not feasible to make the adjustments now, phase them in over the next three years. The monies used for these adjustments should be from a pool separate from salary funds.

Sept 1995

Mercer Study

Personnel will distribute the initial results of the Mercer Study to the administrative staff on September 25th. A representative from Mercer will make a presentation the week of the 25th to all administrative staff reviewing the procedures used in the study. ASC will be working to get as much information as possible to our constituents so that they have a clear understanding of how scoring was done and how to approach the appeals process. The ASC members of the Mercer Committee have lobbied to make the point that we do not support salary caps. A separate proposal will go to the Vice Presidents that addresses administrative staff policies and procedures affected by the Mercer Study. Administrative Staff has had input into this document through our representatives on the Committee.

Market Adjustments

Last year thirty-four administrative staff members applied for market adjustments under the procedures currently in place for administrative staff. Although the Trustees had identified money in the budget for market adjustments, staff members were informed that market decision were put on hold until after the Mercer Study was implemented. ASC will try to get information from the Vice Presidents regarding how market adjustments will be handled for administrative staff caught in this situation.

Oct 1995

Chair's Report

Mercer Study

Bryan Benner stated that he has been inundated with questions regarding the Mercer Study. In discussion at its last meeting, ASC Executive Committee identified several concerns: lack of disclosure about the ratings; the unwillingness of Personnel Services to share how the factors were weighted and how point ranges for each level are calculated; salary ranges for each level; the preference for a neutral appellate body to review appeals; lack of training for ASC staff regarding how the point system works; lack of training for supervisors and managers of administrative staff regarding how to review and evaluate the questionnaires that were completed by their employees; confusion about the original purpose of the study; confusion regarding how the Mercer Study will fit into overall policies and procedures for administrative staff including all of the Handbook revisions that were put on hold by the Administration last year; why 48 positions were changed by the VPs after their original ranking; and the need to extend the deadline for the appeals process.

On the positive side, for the first time administrative staff have the beginnings of a salary structure in place, a commitment to raise the salaries of about thirty employees falling below the minimum for their range, and guarantees that there will be no salary caps and no salaries reduced.

Wayne Colvin introduced a resolution to Council addressed to Dr. Ribeau outlining concerns about the Mercer Study. There was lengthy discussion about the wording and tone of the resolution and Council members raised a number of issues and questions included the following:

- The refusal to release information has created an air of suspicion and mistrust in the process;
- The current process seems to be in direct opposition to the atmosphere of trust, collaboration and collegiality that Dr. Ribeau is promoting;
- Firelands had no representation on the initial Mercer Study Committee;
- In the Student Affairs area some employees have received points based on their old positions but their new title appears on the evaluation form;

- It is unclear how long staff (especially in Student Affairs) will have to wait to have their new positions evaluated and whether or not they will have the opportunity to go through the same appeals process;
- Where will the money come from to raise the salaries of those employees below the minimum? Will it come from next year's general salary increase?
- We have not received enough information to determine whether or not our positions were evaluated appropriately;
- All employees and supervisors should have been sent their scores whether or not they intended to appeal;
- What is the urgency in having the appeals completed by October 13th? If there is some urgency in getting this study to the Trustees by January 1st we need to understand what it is. Has the Department of labor imposed this deadline?
- What comparable institutions were used in the study?
- Discussions with constituents at other universities have indicated that the process has been negative at those schools too;
- Lack of information about the scoring has created suspicion that the process has been administered inconsistently or is flawed;
- We weren't told that the Vice Presidents would review the scoring and realign positions after the initial results were received. At this point the process lost its objectivity.
- The Vice Presidents who made the final decisions are now also the final appellate body.
- The Administrative Staff Council has not been given the opportunity to debate and discuss the issue surrounding the Mercer Study and proposed policies and procedures in our usual committee structure or meetings—in fact approved policies and procedures currently in place in the Handbook (market adjustments) as well as proposed Handbook changes have all been put on hold for the Mercer Study.

Whereas:

The Administrative Staff Council of Bowling Green State University supports President Ribeau's vision "...create a learning community which promotes technological literacy, partnerships, rational discourse and diversity through planning, assessment & participatory governance" as well as the President's goal to "promote values emphasizing collegiality, mutual respect & trust." (1)

Be it resolved that:

The Administrative Staff Council directs the Chair & Executive Committee to inform the President:

1. The Administrative Staff Council strongly supports the concept of the Mercer Study to help correct the problem of salary inequities among administrative staff;
2. The Administrative Staff Council is not in support of the current process given the information we have received to date and strongly feels the plan to propose the Mercer Study to the Board of Trustees in January is premature for the following reasons:
 - a. The process needs to be slowed down and the appeal date should be extended until these issues are resolved,
 - b. More complete information is needed,
 - c. Impartiality must be built into the appeals process,
 - d. Positions which have not been evaluated by Personnel Services should be completed as soon as possible and these staff members should have the same opportunity to go through the appeals process;

3. The implementation of this process should be delayed until such time as a complete, careful and thorough review of the process can be conducted by the Administrative Staff Council. The policies and procedures associated with the Mercer Study should be submitted to ASC as a whole for review and approval;

Be it further resolved:

The Administrative Staff Council directs the Chair and Executive Committee to request a meeting with Administrative Council before October 13th in an effort to begin to establish dialogue for reviewing and resolving the issues related to the Mercer Study;

The Administrative Staff Council directs the Chair to inform the president that the Council would welcome the opportunity to meet with him to discuss these issues.

(1) Dr. Ribeau's 1995-96 Goals

Passed October 5, 1995
Administrative Staff Council

Nov 1995

We have received a thank you from Dr. Ribeau for the resolution regarding the Mercer Study which was passed in October. The administration has been receptive to each of our suggestions: the process has been slowed down; we believe all data is now released and available for administrative staff to review; they have agreed to speed up evaluations that have not been completed; they have agreed to our request for a neutral appeals body; and they have agreed to provide information/training sessions regarding how the evaluations were scored. We have not received a date for ASC Executive Committee to meet with Ad Council but expect this to happen soon.

Council members can forward their suggestions for Administrative Staff to serve on the Appeals Committee to Bryan Benner. Any member of the Administrative Staff who is not submitting their own appeal and was not on the original committee can be nominated.

ASC will recommend that the Appeals Committee review appeals before they are reviewed by the area Vice President.

We want all proposed policies and procedures to come to Administrative Staff Council through the Personnel Welfare Committee for review, including issues like market adjustments, how frequently salary schedules will be adjusted, interim appointments, etc.

ASC should communicate to their constituents that they need to take a close look at the data and make an informed decision whether or not to appeal. Staff members working in the auxiliary areas or funded by grants should not be concerned with how increases will be paid.

A preliminary review of the data shows that approximately 120 positions were moved down by the VPs and 106 moved up. The VPs particularly impacted changes in Academic Affairs, the President's Area and Planning and Budgeting.

Pat Green & Duane Whimire noted that the format of a new document released by Personnel this week would lead anyone looking at it to believe that the Committee and Mercer had reviewed all positions. Mercer reviewed only the benchmark positions. The Committee did not review any positions below about level 14/15. It also did not review Student Affairs or the Athletic Department. Members suggested that Personnel should correct and redistribute this document.

Council members expressed concerns that with so many changes made by the VPs the original study was invalid. The number of changes seemed to indicate that the VPs did not rely on the survey instrument to make decisions but instead went back to existing organizational charts, salary levels and perceptions of positions. This new data has further eroded confidence in how the process has been handled.

Pat Green suggested that with all of the information just released we should ask for an extension of the appeal deadline to allow staff to review the new documentation.

Council directed Executive Committee to request a 30 day extension of the appeals deadline assuming that no new additional information will be released and that all staff members who are waiting to have their positions evaluated will have a reasonable amount of time after receiving their evaluations to prepare appeals.

Dec 1995

The deadline for Mercer appeals is over (with the exception of some positions in the Student Affairs area). The following individuals will review all appeals prior to input from the area Vice Presidents: Ann Bowers, Jeff Grilliot, Deb Wells, Greg Jordan, Deb McLaughlin, Tom Glick and Keith Pogan.

These individuals will receive training by staff in Personnel Services. In order to develop a consistent, objective and equitable process for the committee to follow the ASC Executive Committee has developed an "Appeals Committee Policy Statement" and rating form for use by the Appeals Committee during its review. Bryan will forward this policy statement to the Vice Presidents with the Council's recommendation that it be used to guide the work of the Appeals Committee.

Discussion from the Council included a suggestion that the Appeals Committee should be trained directly by Mercer rather than Personnel Services. Council members expressed concerns that they have received comments from VPs or their staff that indicates they have been reading and commenting on the appeals as they have come into their offices prior to their review by the Appeals Committee.

When the ASC Executive Committee met with Ad Council they were specifically told that the money ^{from} any salary increases mandated by the Mercer Study would come from a general University-wide salary pool. We have now received information from some areas that they are being told that appeals that result in a salary increase must be funded from their individual budgets. This problem exists primarily for auxiliary and grant funded areas. There is concern that the managers are being put in the position of being unable to approve appeals because the administration has not provided specific details to all budget administrators about how these salary increases will be funded. No reassurance has been given to the auxiliary areas that they will not be forced to cover salary increases from their own operating budgets or by eliminating positions or not filling vacant positions.

Council members questioned whether the fact that the proposed salary pool for 1996 had dropped from 5% in 1995 to 3% in 1996 indicated that the 2% difference was being reserved for Mercer salary adjustments. It is unclear that the administration has any specific plan in place.

Council approved the "Appeals Committee Policy Statement" (with minor editorial changes) along with a recommendation that the Appeals Committee be instructed to complete its review of all submitted appeals no later than March 15th, 1996.

Jan 1996

The Appeals Committee is going through its first day of training today. In response to some concerns expressed by administrative staff members Bryan has received assurance that members of the Committee will remove themselves from reviewing any appeals where there could be a conflict of interest because of a Committee member's working relationship with a staff member appealing. The appeals training is being done by staff from our Personnel Office. Mercer will not participate in the training. A total of 94 appeals had been submitted at the end of fall term.

Joan Morgan and Bryan met with Les Barber to discuss concerns of ASC related to the Mercer Study. Topics they discussed included reports that VPs had returned appeals to the front-line supervisors asking them to change their recommendations, concerns that some VPs referred to current employee salary levels as part of the basis for their review of positions, and questions about how raises will be funded in the Auxiliary and General Fee areas and grants. Bryan and Joan suggested that the University find a central

way to fund raises and requested that these discussions be public. Dr. Barber indicated that he would bring these issues to Ad Council and to the President.

It is still unclear how the Department of Labor is driving this process and Joe Luthman suggested that we find out specifically what the Department of labor has asked for from the University.

The ASC Executive Committee and Personnel Welfare Committee are meeting weekly to review the recommendations for policies and procedures after Mercer. In this initial phase of Mercer the difference between "appeals" and "reclassifications" has been confusing. Several staff members requested appeals because of changes in original job descriptions. The new policies and procedures will clarify how these issues will be addressed. The procedures will also ask that a cycle be set in place so that every position on campus is reviewed at regular intervals.

Bev Stearns asked Bryan to get clarification regarding exactly what will happen with the market adjustments put on hold prior to the Mercer Study.

Feb 1996

Guest Speaker: Sidney Ribean

We are required by the Department of Labor to have a classification system in place for our administrative staff. There are things that could have been handled differently with the Mercer Study however we are confident that with the Council's input we have a good appeals process in place that will work through the remaining problems. The Mercer Study has highlighted the need to build trust between the administration & its employees. We must work to build respect for each other so that we can disagree in an atmosphere of trust. The mistakes made with the Mercer Study have taught us that we need to collaborate to create relationships that allow us to take on these difficult issues in better ways in the future

March 1996

Tom Glick reported that the Mercer Appeals Committee has reviewed approximately 130 appeals. Six have been returned to the appellant for additional information. Committee members are very concerned that there are some staff members who submitted their Job Analysis Questionnaire months ago to Human Resources but have not received notification from Human Resources of their evaluation. These staff members deserve to have their evaluations completed quickly so that they can have the opportunity to use the Appeals Process. The Appeals Committee plans to complete its work during the next two weeks and submit their report to Human Resources. Human Resources will distribute a form to all appellants with the recommendations of the Appeals Committee and their comments. Council requested that Bryan send a letter to President Ribean and Bob Martin requesting that administrative staff be notified no later than April 15th of the recommendations of the Appeals Committee.

Bob Waddle presented a summary to Council of the proposed salary recommendations developed by the AC Salary Committee. The Committee reviewed the results of the College and University Personnel Association (CUPA) survey of salaries for the institutions in the State of Ohio. Modified Version 3.1 represents all BGSU CUPA positions found at at least five other institutions (without those positions currently filled by faculty and classified staff at BGSU). This version has been recognized by the Administration for the last six years as the one most appropriate for our salary recommendation. This year the report reflected a 2.48% BGSU loss from the state-side average salary from 94-95 to 95-96. The Salary Committee recommended that ASC continue its goal of attaining the status of at least 4th out of 11 in Ohio comparable institutions considered in the analysis. Although BGSU dropped from 7th to 10th place in the salary study this year, we are actually now 2.93% closer to the fourth place institution than we were one year ago. With a projected rate of inflation of 2.7% the Committee recommended that we request a 6.05% increase for 1996-97 contracts.

Sept 1996

July 22 – ASC Exec met with representatives from Ad council and discussed the following issues:

The inequity that only one employee group on campus will have salary caps

The process of salary levels moving annually

The progress for progressing through the salary range

Joan distributed copies of the Administrative Staff Compensation Plan being presented to the Board of Trustees to Council members.

A concern was raised that approximately 35 staff members still have not received any response to their job analysis questionnaire. Dawn Mays made a motion that the ASC Chair contact Human Resources and inquire as to the missing information. Mary Beth Zachary seconded the motion.

The Administrative Staff salary table has been increased by 2.8% for 1996-1997.

Joan Morgan and Duane Whinnire have expressed opposition to the 5% increase in salary that was proposed for administrative staff moving to a higher position or level. Classified staff receive an 8% increase in this situation. ASC reps are encouraged to discuss their issue with their constituents as the Mercer Group made the initial 10% recommendation that ASC supported.

Oct 1996

Mercer Updates/Concerns

As significant duties and responsibilities change, individuals should be able to initiate a reevaluation of their position.

Joan has asked Bryan Benner that Human Resources send a letter to those staff members who are below the minimum indicating that they will be receiving an increase. These letters were to be sent by October 11.

There is a concern that all staff members who fall into this category are not being identified.

Joan has requested that a letter from Human Resources go to all staff who are at the maximum salary range outlining the appeal process.

How will auxiliary or grant funded areas receive future funding to cover the costs of bringing staff up to the minimum salary range?

Mercer – Phase 2

ASC must be proactive in our input into this process.

A current list is needed of each position and current ranking. This has been requested of Human Resources.

A policy recommendation is needed as to how staff can progress through a salary range. PWC will be working on this issue.

Nov 1996

Mercer Concerns – Concerns have been expressed that many administrative staff have a lack of trust with regard to how the compensation plan was established. There are still questions as to whether or not all salaries below the minimum of their range have been brought up to the appropriate level. Human Resources has attempted to identify these individuals, but staff need to be pro-active in determining if their salary is at the minimum for their range. ASC will continue to follow up on Mercer concerns.

Dec 1996

Joan Morgan received notification from President Ribeau that ASC will receive a data set to assist the Personnel Welfare Committee in analyzing the impact of the Mercer study on administrative staff. Joan and Joe Luthman will work with Human Resources to further clarify our needs. A list should also be coming from Human Resources of all administrative staff positions and current salary levels.

May 1997

Salary:

Gene Palmer presented the Salary Committee's review of the 1996-97 CUPA results.

- BGSU salaries, when compared to the eleven Ohio institutions, rank seventh.
- Miami, Toledo, Ohio University and Kent have consistently ranked higher than BGSU over the past seven years.
- The CUPA analysis is based on 93 administrative staff positions at BGSU. 87 of these positions are in the Mercer grades fourteen or higher. This report provides no insight for positions below grade fourteen, gender/ethnic issues or time in position.

- The committee recommends that BGSU salaries should be at a level consistent with Kent/Miami. To become a reality this will require an equivalent salary increase to that of Kent/Miami plus an additional 3.39% to equal Kent or an additional 3.823% to equal Miami. Providing salary increases higher than Kent and Miami over the next several years would have the same result.

March 1998

Salary: (Gene Palmer, Chair) - Jan Ruffner read the recommendation that was e-mailed to ASC members. Jan moved to accept, Carmen seconded. Pat Green explained the reasoning behind #2. It was suggested to amend the proposal to include the following under #2: While the pay ranges increase annually at 1% less than the total raise (combination of merit and across the board increase), it is recommended administrative staff receive an across the board increase equivalent to the increase in the pay range. For example, if the total raise is 3% and the pay range increases by 2%, the across the board raise should be 2%. This prevents administrative staff from moving backward in the pay range and possibly falling below the minimum. Pat moved to accept the amended change, Inge seconded. Matt Webb moved to suspend the rules, Deborah Knigga seconded. Motion approved. Motion to accept amended changes approved. Duane will send this proposal forward to Dr. Middleton by Friday, March 6.

Oct 1999

Updates on meetings with Rebecca Ferguson, director of Human Resources: Regarding the working out of President Ribean's Compensation Plan, Ferguson had indicated that Ribean had assigned the task of setting the benchmark for Administrative Staff Salaries to Human Resources. She had also indicated that Mercer would come in during the process to review pay ranges. It was also reported at Exec that the letter to supervisors regarding the need to establish merit criteria would be going out, a task which has since been accomplished.

Lopez and Zachary shared the ASC goals and the progress that has been made on them and expressed appreciation for the \$662 market adjustment to Administrative Staff salaries.

May 2000

Breakfast meetings with the Director of Human Resources (4/18 & 5/2)

- Year Two Compensation Plan: 12/31/99 is the adjustment determination date (for 9+ years and 5+ years adjustments). Those with a 12/31/1994 and before hire date included in 5+ years adjustment. Missing in the adjustment group are the group hired 1/1/95 to 12/31/95 before Mercer took effect on 1/1/96. The whole point of the PWC plan was to "place" individuals correctly that were hired before the Mercer Plan began and started to make an experience-based determination on where people were hired in at in their salary range. Ferguson brought a list of hires she found that fell into the above qualification. She showed Lopez that all but two of them had completed a Job Analysis Questionnaire. He convinced her to re-cut the data to include this group of people for their consideration of including them in the next round of adjustments.
- Mercer review of the ranges inquired about: How does it impact those at cap? Will there be a cap this year? If so, how will those at the cap be compensated for Merit they've earned in the last year? Can we have a list of those that will be at cap?
 - Review of the ranges has not happened. When it does happen, Ferguson will be looking to make the "cap" issue moot. More to come later.
- Salary inversion/compression issues. Process of identifying and dealing with them? Will there be funds allocated for this?
 - HR will continue to deal with these issues as they are identified and Ferguson is confident there will be funds available to do that.

Oct 2000

Zachary also reported that she and John Clark have met in their regular meetings with the Director of Human Resources and also with Executive Vice President, Linda Dobb. In these meetings they have learned:

1.) that Mercer is in this week to gather data from which to evaluate the ranges. HR created a list of positions in each range with the position description and years in position. Mercer will select benchmark positions and run those against their market database. This analysis will take a couple of months. They'll let HR know their recommendations.

2.) Regarding the President's compensation plan year 3, HR will be identifying all positions that have not been yet touched by any of the actions to date in the compensation plan. The next step will be to identify positions for which we have market data because the positions are identified in the CUPA data. HR will then make a list of those not having market data. Those positions will have market data gathered.

Nov 2000

Human Resources:

- President's Compensation Plan-3rd year and after-- The year will cover a review of the ranges by Mercer, a discussion of the caps issue, and identification of those not yet dealt with in the past two years of compensation. Those who have market data available, (e.g. CUPA and Mid-Level-CUPA data) will be those who are targeted for market evaluations this year. HR will share with us how the total number of Administrative staff break out into the groups who have been or will be addressed in the President's Compensation Plan. Many positions have been covered already by being included in the first two years of the President plan, by submitting a new JAQ because there was a vacancy in the position, or because there existed a gross/blatant disconnect between the compensation for a position and the market.

Dec 2000

-Compensation

Wittwer then addressed compensation issues. Scott Cook from Mercer was hired to look at positions, especially those that are not competitive with the market. Two areas that are being looked at are ITS and Development. Some possible results could be that separate pay ranges are established for these areas or perhaps market adjustments are given. Caps are currently an issue because pay ranges were frozen. A question was raised as to why Administrative Staff are the only group with caps. The question was raised as to whether or not there is a percentile target for Administrative Staff salaries. There is not.

Wittwer next discussed the Administrative Compensation report she prepared for this meeting. The information presented is a scatter gram snapshot of the November payroll. Interim positions are not included because they skew the data. The report compares the number of years in current position to salary for 510 Administrative Staff members. This is shown by grade. The top of each grade chart is higher than the cap in order to allow those above the cap to be included. Discussion during the presentation included a variety of points. The observation was made that there is a preponderance of staff below the salary midpoint. The point was raised that there are several new hires who are earning more than those with more years in position. Wittwer said that in some cases the person could have been re-graded or the new staff may have had a lot of prior experience. The point was raised that there could be someone in a position for several years and someone new with similar experience is hired for more money. A suggestion was made to color code the dots in the report to differentiate those who were new to BGSU from those whose were already at BGSU and their positions were reevaluated. A question was asked about how to reevaluate a position. Wittwer suggested that a good time to reevaluate the Job Analysis Questionnaire would be at the time of the Performance Evaluation if it is shown that there is a need. The signature of the supervisor is required for a reevaluation. The observation was made that there is a shelf between those with 7 years or less and those with 9 years or more in position. One reason for this could be the fact that those positions occupied with the same person for 9 or more years were examined during the first year of the Administrative Compensation Plan. The point was raised that although ASC may want to look at years of service, the administration does not. They want to look at merit. Also, if someone moved from a Classified Staff position to an Administrative Staff position, only the years in the Administrative Staff position were taken into account. Wittwer said that Human Resources is also looking at staff whose positions have not been reevaluated since 1994 to see if the positions are in the appropriate grade level. When looking at positions, there are 2 issues. The first is the grade of the position, which measures the value of the position. The second issue is the salary, which has to do with the value of the person in that position. The observation was made that the University is not doing market reviews of positions unless a person receives an offer elsewhere or there is a request for a market review from a University vice president. It was

mentioned that PERS has increased benefits for those with more than 30 years of service in order to encourage staff to work longer and that there are possible changes for new hires regarding defined benefit. The concluding point was made that the goal is to work toward fairness in Administrative Staff salaries.

Human Resources:

Most discussions encompassed the information to be presented to the Council on December 7th. Topics to be addressed briefly include: An update on work with Mercer, year 3 of the compensation plan; and overall admin staff compensation picture (perhaps in the form of scatter-grams); health insurance challenges and open enrollment; FMLA; performance evaluation; teaching compensation; changes in % of PERS payments after 30 years of service; violence in the workplace. The appropriate ASC committees will follow up on topics that require pursuit.

Feb 2001

Past chairs also suggested that we continue to gather CUPA data and to develop the comparative positioning of BGSU in relation to the other institutions with which we have been compared in the past. Other efforts we should "not lose" in the transitions between chairs include continuing to pursue multi-year contracts for long-term successfully performing administrative staff, promotions through the university, progress through the ranges, and grievance processes for non-renewal of contract.

Questions that we need to answer include, has the mercerization of compensation helped those people we intended to help? Have we explored all the options we could with a compensation plan? For instance, could we "broad-band" ranges meaning could we shift to fewer levels and have broader pay ranges with which they are associated. Might there be an effective way to do away with caps? For the size of our student population, how do we compare in numbers of staff? How are we going to address the morale and equity concerns associated with caps? Bonuses may be one way to address the inequities presented by the compensation plan policies enacted by BGSU. If we are truly to be a merit-driven system, then performance must be rewarded the same way for all individuals. If merit is earned, merit should be paid. How has the plan worked to date for all staff? Certainly, minimum salaries have been improved. How has it worked for others? Should market area be the same for all positions? Could there be other ways to improve compensation? Could we, for instance, receive a higher percentage of payment for unused sick leave at retirement? Could we identify the necessary skills for individuals to move into higher level positions?

President's Office

In a meeting with Eileen Sullivan, John Clark and I raised several issues of concern to administrative staff, one of which was again attending the meeting with Scott Cook of Mercer.

Scott Cook of Mercer

The meeting with Scott Cook of Mercer included:

- Executive Vice President Linda Dobb
- Rebecca Ferguson and Donna Wittwer of Human Resources
- Ann Bowers, Paul Yon, and Bryan Benner past chairs of ASC
- Joe Luthman representing ASC PWC
- Dave Garcia representing ASC Salary Committee
- John Clark and Mary Beth Zachary, ASC chair-elect and chair respectively.

Mr. Cook gave us a thumbnail sketch of how Mercer develops ranges. Mercer has a library of surveys and market tools from which they pull information about positions. Some of the surveys are highly specialized, but still they run their own surveys and purchase many others. Most of what they use for higher education is based on higher education surveys and data. They do use, however, some industry surveys in developing ranges. They include industry data to make sure our salaries are competitive. What are the markets to which we are compared? Perhaps the answer for BGSU is from where do we recruit? He will also be determining market for benchmark positions, which were provided by HR with input from administration. BGSU targeted the 50th percentile (median) as the goal for its benchmark comparisons. Mercer will work to provide external equity or competitiveness for those positions. Regarding CAPS, Mercer gave several possible ways to address caps. Bonuses are one way to offer compensation for meritorious work. Other

topics addressed practices regarding salary movement to the midpoint and after the midpoint and weighting of job analysis questionnaire elements.

Personnel Welfare

The committee members are performing research work in order to formulate a recommendation to ASC Executive Committee on the rotation process for the Administrative Staff Advisory Team. This group hears Job Analysis Questionnaire appeals. The research includes discussions with advisory team members and Human Resources, along with investigating other University appeal processes at similar-structured schools in Ohio, Michigan, and Indiana.

April 2001

Administrative Staff Council hopes to enter into a plan-building discussion to articulate policies and procedures regarding the following:

- o Range evaluation and movement of ranges
- o Periodic, systematic market review of all positions
- o Acceleration to/toward range midpoint (a Mercer assumption)
- o Salary progression throughout the ranges
- o Salary inversions and egregious compressions

May 2001

- Scott Cook, from Mercer, will be returning to BGSU on May 23rd for further consultation. One of the issues he will be discussing is movement of the pay ranges. John Clark and Mary Beth Zachary will get to meet with Mr. Cook for one hour. Clark asked for questions from ASC.
- Responding to Clark's request for feedback on Clark and Zachary's March 14th presentation to the President's Compensation Working Group, Executive Vice President Dobb stated that the Working Group clearly heard the need to bring administrative staff with five or more years in position up to at least the first quartile of their pay range. Other issues, Dobb stated, will require further discussion between ASC and Human Resources.
- In later discussion, President Ribeau agreed that it is prudent for ASC and HR to create together a comprehensive, systematic compensation plan for administrative staff. As the President stated, we must plan for the time when we will have money, so that we can appropriately reward employees who have supported the institution through more difficult financial times.

Notes from Mercer Meeting: 5/23/01

On May 23, 2001, ASC representatives John Clark, Laura Emch, and Mary Beth Zachary met with Mercer, Inc. consultant Scott Cook, HR representatives Becca Ferguson and Donna Wittwer, and EVP Linda Dobb to discuss Mercer's follow-up recommendations on administrative staff compensation to the President's Compensation Working Group. The following are notes from that meeting, compiled by John M. Clark—2001-2002 ASC Chair.

1. Mercer's History with BGSU: In 1995, Mercer came to BGSU to assess the market competitiveness of our administrative/professional staff compensation. In particular, their focuses were 1) base pay, 2) pay ranges, and 3) review of IT positions.
2. In 2001, Mercer conducted a follow-up study based on 57 "benchmark" administrative positions. These positions were chosen as benchmarks by the vice presidents based on their representativeness of the entire administrative employee group.
3. This year's Mercer study, special emphasis again was given to IT positions.
4. Mercer compiled salary data from 24 surveys, reflective of salary medians, representative of our geographic recruiting area (for each benchmark position), and *adjusted to July 1, 2001* (i.e., the data were "aged" to be representative of the market on the beginning of our next fiscal year.).

5. Data matching was done based on job content, not type of position. (This reinforces Mercer's consistent focus on skill sets rather than department or specific position.)

6. Elements of Mercer's Competitive Assessment

- Actual salaries and pay ranges compared to [recruiting area] market.
- Variance between ratios not typical
 - ^ Actual salary ratios may vary due to differences in employee credentials
 - ^ Midpoint ratios may vary due to valuation differences placed on the position by different institutions (a one-grade difference from "market" is OK, but not three or four grades difference in a position)
 - ^ IT is judged separately
- Ratios calculated by comparing...
 - ^ actual salaries to market (average of all incumbents in a position)
 - ^ range midpoints to market

7. Actual Salary Competitiveness:

- In 1995, all administrative/professional jobs at BGSU were at 99% of market (market being the 50th percentile for each position, this means our average was the 49.5 percentile)
- In 2001, all administrative jobs at BGSU, as a group, are at 95% of market (or 47.5 percentile)
- Our IT are presently worst in relation to market—88% or 44th percentile
- *Distribution* in relation to pay range and market is also crucial; the above percentiles are averages, and individual persons or position can be higher or lower than BGSU average

8. Pay Structure Competitiveness:

- The administrative/professional ranges, as an aggregate, now are at 89% (44.5 percentile) of market—these ranges were set in 1995 exactly at 100%, or the 50th percentile, of market
- Our IT pay ranges are now at 83% of the market, or the 41.5 percentile
- "Outliers" could be inappropriately graded, or the market valued the job differently than the institution (e.g., pharmacists, physicians, IT)

9. Salary Range Placement:

- Ranges set at 100% of market (50th percentile) in 1995
- In January, 1996, implementation of the BGSU Mercer Plan raised administrative employees only to minimum of range
- This implementation also created some salary compression—brought some newer employees close to the salaries of longer-term employees in the same unit and/or similar position
- Midpoint (50th percentile of pay range) is Mercer's recommended market target for admin.
- Mercer also notes that the market "norm" for administrative/professional positions is for employees to reach midpoint of pay range within 4 to 7 years in position

10. A Mercer Model for Advancement through Pay Range:

- Mercer posits that administrative employees in the first quartile, minimum to 25th percentile, should be in the "learning and growing" stage for the position (and, conversely, that employees beyond the learning and growing stage should be higher in the pay range)
- Mercer considers administrative employees in the second pay range quartile, 26th percentile to midpoint, "seasoned and competent" for their positions
- Mercer considers administrative employees in the third pay range quartile, 51st to 75th percentiles, "outstanding and sustained performers" for their positions
- Mercer considers administrative employees in the top pay range quartile, 76th percentile to range maximum, inhabitants of "premium territory"—employees whose base salary at the beginning of the contract year puts them among the highest paid in the market for their positions

- Mercer notes that "best practice" of institutions across the U.S. now considers it appropriate for 15-20% of the total workforce to be in the "outstanding sustained performance" and "premium" salary levels—and that these base salaries relative to market for the positions be established by performance, not longevity alone
- Finally, Mercer notes that best compensation practices or plans across the country include a pay and performance-reward package to accelerate movement of good performers in years 0-7 (within position) to range midpoint

11. As consultant Scott Cook explained, the portion of "best compensation practice" least understood is that institutional expectations are much higher for the midpoint and up, "premium base pay area than for the minimum-to-midpoint (0-50th percentile) area. All of an employee's experience, knowledge, and superior performance over the years plus an excellent performance in the past equal a premium salary that might be increased for the upcoming year.

12. Range "Penetration":

- Average of all BGSU administrative/professional employees is 57th percentile of range
- Average years in position for all BGSU administrative employees is 6 years
- Increased penetration of range by some administrative staff could be offset by decreased penetration by others

13. Mercer Recommendations:

- Adjust pay ranges to align with market median (required adjustment = 8-9%); one option, if range adjustments of this magnitude is unmanageable, would be smaller pay-range increases (smaller than 8-9%) over the next one to three years—a phasing-in approach
- Re-examine internal pay-range placements of positions in the Development area
- Establish a separate pay range structure for IT positions
- Re-evaluate significant outliers with respect to midpoint ratios (positions significantly out of market norm relative to the position pay range)
- Review current employee salaries, after the structural or pay-range adjustment, to re-establish internal and external pay equity

Sept 2001

Salary market adjustment distributions: Five administration staff hired in position in 1995 (prior to Mercer implementation) received in August 2001 (retroactive to 7/1/01) market adjustment distributions H.R. considers commensurate with the group who had 5-8 years in position as of 12/31/99. "Commensurate," in this context, was defined as "3rd quartile between the minimum and first quartile. . . of. . . pay grade." To recap, all administrative staff with 9 or more years' experience in position as of 12/31/99 were brought up to the midpoint of their 99/00 pay ranges in May 2000. In August of 2000, employees with 5-8 years' experience in their current positions were brought to a specified position within their 99/00 pay ranges and closer to the midpoint. (Source: BGSU office of Human Resources.) As of 12/31/00, a strong majority of this 5-8 group (as of 12/31/99) was at or above pay range midpoint. Notably, the small group of employees who most recently received market adjustment distributions—employees now serving their 7th year in current position—still are below 1st quartile in their pay ranges and below many of their peers who started in position 1998-2001.

Jan 2002

Joyce Blinn asked Dr. Folkins to speak about the recent return of Mercer to campus. He indicated that the study went to Human Resources. Rebecca Ferguson can address the findings.

May 2002

Our presentation to the Administrative Compensation Working Group was well received. Late-breaking statistics show that administrative merit awarded over the past five years slightly outpaced national

inflation. At the same time, however, our aggregate pay ranges lost 7 percentile points to our competitive market. We have recommended a 4.2% increase in all pay ranges, as a catch-up. We also have recommended that Mercer come in every three years to recalibrate our pay ranges.

Additional stats:

Our aggregate "range penetration" (average for all) as of March 2002 was 49th percentile (remember that our ranges are out of balance with the market, however)

In grades 18-22, 58 staff average 81st percentile of range, approx. 9 staff over maximum

In grades 16 & 17, 134 staff average 60th percentile of range, approx. 47 staff below midpoint

In grades 14 & 15, 196 staff average 39th percentile of range, approx. 114 staff below midpoint

In grades 9-13, 147 staff average 39th percentile of range, approx. 103 staff below midpoint

We also recommended to the Compensation Group a 5% base merit increase for 2002-03 and a 1.5% super merit pool.

Feb 2003

Salary: Dave Garcia reported that the committee has not received the CUPA data yet. Donna Wittwer indicated that CUPA had questions for HR that had been answered, and she hoped to have the data shortly. Dave reported that each committee member has been assigned two or three state institutions to research salary and benefit information. They will be contacting the institutions' human resource departments. Dave mentioned that if Ohio's proposed income tax changes do not go through then the possibility for raises is questionable. Laura Emch indicated that whether the money is available or not, the information is vital. John Clark agreed saying that this data can then be used historically.

Dave Crooks asked if it was appropriate to seek information from institutions when Mercer provides information. The response was that Mercer compares our reality to the outside market and is composite data. CUPA is person specific.

Joe Luthman asked why some institutions such as Ohio State and University of Cincinnati were being excluded from the research. Dave responded that these two institutions tend to have higher salaries and are not seen as comparable to BGSU. Laura asked if the faculty exclude institutions when looking at their salary information. John Clark responded that they do not as their market is seen as nationwide. Joe asked if we should gather information from "premier institutions" if our goal is to be a premier institution. John Clark responded that it is hard to do a comparison because of the size of the offices at institutions such as Ohio State.

Laura Emch asked that the committee ask the institutions how much compensation issues have changed that might influence salaries. As an example she gave an institution might receive a 1% raise but health care costs increased 3%.

Jan 2004

Personnel Welfare/Salary

Committee met with HR to discuss ASC compensation and ways to advance staff to the mid point of their salary ranges. According to the Mercer report, staff should reach the midpoint within 4-7 years of employment. Advancements beyond that point would require exemplary performance. HR recommended that ASC create a salary range plan, in addition to the annual salary recommendation, that would address these concerns and show how staff would be moved up the scale. It was further recommended that ASC find ways to set-up a pool of money to be used to pay these staff members (Faculty were able to use a pool of money they saved from ERIP). An electronic version of top administrative staff status' (showing years served, pay rates, etc.) was received by committee chairs and is currently under analysis. Longevity, not just new hires will be reviewed. President's Council would like recommended compensation plan for 2004-2005 by 2/29/04.

Feb 2004

The mid-point (aka Market Value, per HR) shall be reached within 4 – 7 years of new hires who are "meeting expectations" according to the Mercer Compensation Report (May 2001). HR report indicate most lower-mid pay grade administrative staff members are hired in at the 25-50% quartile and only

progress through ranges when they have not only "met expectations" but have also performed "meritoriously." Higher pay grade employees (pay grade 19, 20, 21) are usually hired in at market value or above (75th percentile). Council's suggestion was to set a specific number of years (4) to get to the mid-point rather than use a range, as well as keep in mind the implementation period in doing so. By setting a set year, plans could be implemented to make sure the four year mark is met when staffs are at least meeting expectations.

The 2nd discussion point given priority was moving beyond the mid-point, specifically for longer serving employees. Currently the data indicates that once employees reach the mid-point they typically get stuck there, despite how long they have been in the position. Careful consideration must be given to ensure that both groups of staff (below and at the mid-point) are not penalized by helping one group over the other. This may provide some incentive for long term employment vs. the average 3-5 year turnover common among administrative staff.

Others items of discussion include:

- (1) A review of the salary ranges. Have the salary ranges been adjusted frequently enough to keep up with the changes in the market? If market value for some staff falls in the 75th percentile, then shouldn't the ranges be adjusted for all staff when the 50th percentile is used for market value hires?
- (2) Recommendation for 10% minimum salary increase for serving in an acting interim role in a higher salary graded position or having a Mercer position Job Description rewriting resulting in a higher salary grade.

May 2004

. The President's Compensation Committee ended up taking all 6 of ASC's compensation discussion topics to the President's Cabinet for further discussion.

- They are aware that we are continuing to formulate a plan to bring all employees to the mid point of their respective salary range by a certain year.
- They understand that the salary ranges must be adjusted to maintain competitiveness in the marketplace and are making adjustments for this coming year. Mercer will be visiting in 2005 to evaluate that movement and see how far off we are from the market.



Bowling Green State University

Office of the President
Bowling Green, Ohio 43403-0010
(419) 372-2211
Fax: (419) 372-8446

MEMORANDUM

TO: Administrative Staff
FROM: Paul J. Olscamp
DATE: September 23, 1994

Paul J. Olscamp

Encl.

Bowling Green State University is planning to implement a job analysis and compensation program for the administrative/professional staff. The University has requested and received a proposal from William M. Mercer, Inc., Columbus, Ohio to assist in the design and implementation of the job analysis and compensation program for the administrative staff. Presently, the University has no formal process in place for analyzing and evaluating administrative/professional staff positions.

The program will include the following items as part of the project:

- Development of job specific information on all the approximately 450 administrative job titles within the University. *- job description? general / specific*
- Development of job descriptions tailored to meet the University's needs as well as complying with appropriate laws (EEO, ADA, etc.).
- Determination of appropriateness of job titles and making changes as necessary. *How will this affect me in individual wage in some position?*
- Development of a customized point factor methodology to measure the value of each administrative/professional staff position on an objective basis. *NOT POSSIBLE*
- Compilation of market salary data and development of a compensation structure tailored to Bowling Green State University's unique needs and circumstances. *compensation? to?*
- Development of analysis to determine necessary individual compensation costs and job title adjustment. *what? personal?*
- Preparation of a final report outlining study methodology to include documentation and recommendations arising from this project.

We will start in September with a projected completion date of June, 1995. Your cooperation and assistance is greatly appreciated.



Bowling Green State University

Personnel Services
100 College Park Office Building
Bowling Green, Ohio 43403-0370
(419) 372-8421
Fax: (419) 372-2920

September 30, 1994

ANNOUNCEMENT LETTER TO ADMINISTRATIVE STAFF

Dear Bowling Green State University Administrative Staff:

Bowling Green State University is committed to a fair and equitable job evaluation system as the basis for recognizing the relative value of jobs to the institution's operation. This commitment is particularly important as technological advancements and modern systems create new and different jobs and dramatically affect the ways in which we perform traditional ones.

Over the next several months, we will be conducting a detailed study of the job evaluation system for our Administrative/Professional staff. To assist us in this study, we have retained the services of William M. Mercer, Incorporated (Mercer), a leading human resource management consulting firm with a very strong background in higher education.

Your understanding of the University's efforts to maintain a fair and equitable job evaluation program is important; it is just as important for you to understand what will not result from the study. We would like to emphasize these points:

- Regardless of the outcomes of job evaluations, no one will receive a reduction in pay as a result of this study.
- Although some jobs may be re-evaluated, there is no guarantee that any employee will receive a pay increase as a result of the study.
- This study will investigate job content, not employee performance.
- This is not an efficiency study; consequently, we will not be reviewing staffing levels within departments and operating units.

The initial and most critical step of the study will be to document the content of each of the jobs to be included in the system. In order to obtain this detailed information, you will be requested to complete a survey instrument which will address all components of your job. This effort to obtain a fair and accurate representation of all jobs as they are actually being performed will be important to the ultimate success of the project. On Tuesday, October 11, two sessions will be held, one at 11:00 a.m. and one at 1:30 p.m. in 113 Paul J. Olscamp Hall. Mercer will conduct these communication sessions to answer questions and concerns, but more importantly, instructions will be given for the completion of a questionnaire. This questionnaire must be completed and returned to Personnel Services by all administrative staff in order to complete this task.

The job evaluation study is a significant undertaking for Bowling Green State University. We appreciate your cooperation and assistance in this important endeavor.

Sincerely,

BGSU Administrative Staff Job Analysis Committee

John C. Moore
Bryan Benner
Rob Cunningham
Pat Green
Linda Hamilton
Barb Keller
Shirley Colaner

Pat Patton
Walt Montenegro
Duane Whitmire
Norma Stickler
Teri Sharp
Randy Sokoll
Karen Woods

Whereas:

The Administrative Staff Council of Bowling Green State University supports President Ribeau's vision to "...create a learning community which promotes technological literacy, partnerships, rational discourse and diversity through planning, assessment & participatory governance" as well as the President's goal to "promote values emphasizing collegiality, mutual respect & trust." (1)

Be it resolved that:

The Administrative Staff Council directs the Chair & Executive Committee to inform the President:

1. The Administrative Staff Council strongly supports the concept of the Mercer Study to help correct the problem of salary inequities among administrative staff;
2. The Administrative Staff Council is not in support of the current process given the information we have received to date and strongly feels the plan to propose the Mercer Study to the Board of Trustees in January is premature for the following reasons:
 - a. The process needs to be slowed down and the appeal date should be extended until these issues are resolved,
 - b. More complete information is needed,
 - c. Impartiality must be built into the appeals process,
 - d. Positions which have not been evaluated by Personnel Services should be completed as soon as possible and these staff members should have the same opportunity to go through an appeals process;
3. The implementation of this process should be delayed until such time as a complete, careful and thorough review of the process can be conducted by the Administrative Staff Council. The policies and procedures associated with the Mercer Study should be submitted to ASC as a whole for review and approval;

Be it further resolved:

The Administrative Staff Council directs the Chair and Executive Committee to request a meeting with Administrative Council before October 13th in an effort to begin to establish dialogue for reviewing and resolving the issues related to the Mercer Study;

The Administrative Staff Council directs the Chair to inform the President that the Council would welcome the opportunity to meet with him to discuss these issues.

(1) Dr. Ribeau's 1995-96 Goals

Passed October 5, 1995
Administrative Staff Council

PENETRATION WITH TIME OF EMPLOYMENT

INCREASE IN RANGE = 1% LESS THAN SALARY INCREASE

GRADE RANGE 14

| | |
|--------------------------------------|----------|
| Minimum of Salary Range | \$29,507 |
| Middle of Salary Range | \$37,622 |
| Maximum of Salary Range | \$45,736 |
| Initial Salary Penetration | 0.00% |
| Assumes Salary Pool Each Year Equals | 3.00% |

| Years of Employment In Range | Employee Salary Increase/Yr 3.00% | Minimum Salary Increase/Yr 2.00% | Maximum Salary Increase/Yr 2.00% | Employee Penetration In Salary Range | |
|---------------------------------------|--------------------------------------------|-------------------------------------------|-------------------------------------------|-----------------------------------------------|-------------------------------|
| 1 | \$29,507 | \$29,507 | \$45,736 | 0.00% | Starts at 0% Penetration |
| 2 | \$30,392 | \$30,097 | \$46,651 | 1.78% | |
| 3 | \$31,304 | \$30,699 | \$47,584 | 3.58% | |
| 4 | \$32,243 | \$31,313 | \$48,535 | 5.40% | |
| 5 | \$33,210 | \$31,939 | \$49,506 | 7.24% | |
| 6 | \$34,207 | \$32,578 | \$50,496 | 9.09% | |
| 7 | \$35,233 | \$33,230 | \$51,506 | 10.96% | |
| 8 | \$36,290 | \$33,894 | \$52,536 | 12.85% | |
| 9 | \$37,379 | \$34,572 | \$53,587 | 14.76% | |
| 10 | \$38,500 | \$35,264 | \$54,659 | 16.69% | |
| 11 | \$39,655 | \$35,969 | \$55,752 | 18.63% | |
| 12 | \$40,845 | \$36,688 | \$56,867 | 20.60% | |
| 13 | \$42,070 | \$37,422 | \$58,004 | 22.58% | |
| 14 | \$43,332 | \$38,170 | \$59,164 | 24.59% | |
| 15 | \$44,632 | \$38,934 | \$60,348 | 26.61% | |
| 16 | \$45,971 | \$39,713 | \$61,555 | 28.65% | |
| 17 | \$47,350 | \$40,507 | \$62,786 | 30.72% | |
| 18 | \$48,771 | \$41,317 | \$64,041 | 32.80% | |
| 19 | \$50,234 | \$42,143 | \$65,322 | 34.90% | |
| 20 | \$51,741 | \$42,986 | \$66,629 | 37.03% | |
| 21 | \$53,293 | \$43,846 | \$67,961 | 39.17% | |
| 22 | \$54,892 | \$44,723 | \$69,321 | 41.34% | |
| 23 | \$56,538 | \$45,617 | \$70,707 | 43.53% | |
| 24 | \$58,235 | \$46,530 | \$72,121 | 45.74% | |
| 25 | \$59,982 | \$47,460 | \$73,563 | 47.97% | |
| 26 | \$61,781 | \$48,409 | \$75,035 | 50.22% | Reaches Midpoint in 26th Year |
| 27 | \$63,635 | \$49,378 | \$76,535 | 52.50% | |
| 28 | \$65,544 | \$50,365 | \$78,066 | 54.79% | |
| 29 | \$67,510 | \$51,372 | \$79,627 | 57.11% | |
| 30 | \$69,535 | \$52,400 | \$81,220 | 59.46% | |

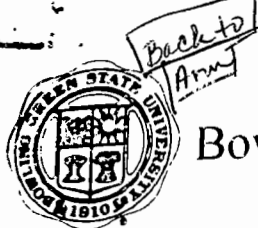
PENETRATION WITH TIME OF EMPLOYMENT

INCREASE IN RANGE = 1% LESS THAN SALARY INCREASE

GRADE RANGE 14

| | |
|--------------------------------------|----------|
| Minimum of Salary Range | \$29,507 |
| Middle of Salary Range | \$37,622 |
| Maximum of Salary Range | \$45,736 |
| Initial Salary Penetration | 0.00% |
| Assumes Salary Pool Each Year Equals | 3.00% |

| Years of Employment In Range | Employee Salary Increase/Yr 5.61% | Minimum Salary Increase/Yr 2.00% | Maximum Salary Increase/Yr 2.00% | Employee Penetration In Salary Range | |
|---------------------------------------|--------------------------------------------|-------------------------------------------|-------------------------------------------|-----------------------------------------------|------------------------------|
| 1 | \$29,507 | \$29,507 | \$45,736 | 0.00% | Starts at 0% Penetration |
| 2 | \$31,162 | \$30,097 | \$46,651 | 6.43% | |
| 3 | \$32,911 | \$30,699 | \$47,584 | 13.10% | |
| 4 | \$34,757 | \$31,313 | \$48,535 | 20.00% | |
| 5 | \$36,707 | \$31,939 | \$49,506 | 27.14% | |
| 6 | \$38,766 | \$32,578 | \$50,496 | 34.53% | |
| 7 | \$40,941 | \$33,230 | \$51,506 | 42.19% | |
| 8 | \$43,237 | \$33,894 | \$52,536 | 50.12% | Reaches Midpoint in 8th Year |
| 9 | \$45,663 | \$34,572 | \$53,587 | 58.33% | |
| 10 | \$48,225 | \$35,264 | \$54,659 | 66.83% | |
| 11 | \$50,930 | \$35,969 | \$55,752 | 75.63% | |
| 12 | \$53,787 | \$36,688 | \$56,867 | 84.74% | |
| 13 | \$56,805 | \$37,422 | \$58,004 | 94.17% | |
| 14 | \$59,992 | \$38,170 | \$59,164 | 103.94% | |
| 15 | \$63,357 | \$38,934 | \$60,348 | 114.05% | |
| 16 | \$66,911 | \$39,713 | \$61,555 | 124.53% | |
| 17 | \$70,665 | \$40,507 | \$62,786 | 135.37% | |
| 18 | \$74,630 | \$41,317 | \$64,041 | 146.59% | |
| 19 | \$78,816 | \$42,143 | \$65,322 | 158.22% | |
| 20 | \$83,238 | \$42,986 | \$66,629 | 170.25% | |
| 21 | \$87,907 | \$43,846 | \$67,961 | 182.71% | |
| 22 | \$92,839 | \$44,723 | \$69,321 | 195.61% | |
| 23 | \$98,047 | \$45,617 | \$70,707 | 208.97% | |
| 24 | \$103,548 | \$46,530 | \$72,121 | 222.80% | |
| 25 | \$109,357 | \$47,460 | \$73,563 | 237.12% | |
| 26 | \$115,492 | \$48,409 | \$75,035 | 251.95% | |
| 27 | \$121,971 | \$49,378 | \$76,535 | 267.30% | |
| 28 | \$128,813 | \$50,365 | \$78,066 | 283.20% | |
| 29 | \$136,040 | \$51,372 | \$79,627 | 299.65% | |
| 30 | \$143,672 | \$52,400 | \$81,220 | 316.69% | |



Bowling Green State University

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MAR 18 1996

March 18, 1996

VICE-PRESIDENT
PLANNING AND BUDGETING

UBC
FSBC
FBI

Colton
3/18/96
3/19

MEMORANDUM

TO: Dr. J. Christopher Dalton
Vice President, Planning & Budgeting

FROM: Bryan Benner *bb*
Chair, ASC

RE: Salary Recommendations

The following concerns the ASC recommended percentage salary increase for FY96-97. Per discussions at our ASC March 7, 1996, Council meeting, it was clear that Administrative Staff at BGSU supports the concept of merit pay. The difficulty Administrative Staff have with merit pay arises from the lack of both a consistent performance evaluation and merit pay processes. The lack of these processes has led to the inconsistent and arbitrary distribution of merit.

The ASC recognizes that presently the office of Human Resources is developing a new administrative performance evaluation system, and this process is proceeding with broad input from Administrative Staff members. If the end result is a consistent and fair performance system for all Administrative Staff, the foundation for developing consistent and appropriate distribution of merit pay on a objective basis may become possible.

Over the years, little money has been available for real merit increases. When money has been available, managers and employees alike agonize over a fair assessment of merit pay. Lacking objective criteria, subjective value judgments must be made. Many managers, accurately recognizing lose-lose propositions, do not distinguish between merit increases, assigning values that result in 100% across the board pay increases. While merit pay systems may be viewed by some as counterproductive to community building, fair and equitable merit systems can be developed that foster teamwork and improve work performance.

Considering the lack of a consistent evaluation process at this time, we would recommend that merit be deferred until such a system is in place. If it is determined that merit is still to be distributed in FY96-97, then as in past years, we would recommend that merit only be considered for that portion of the proposed increase beyond the expected rate of inflation.

Concerning the ASC percentage increase for FY96-97, our recommendation is based on the long standing goal of attaining a 4th salary position amongst Ohio Public Universities. During FY95-96 according to the CUFA DATA which has been used to evaluate administrative staff salaries over the last 6 years, BGSU would move from 7th to 10th place out of 11 institutions. In order for us to move into 4th place at this time, an increase of 6.05% is required. Therefore, the recommendation of ASC is a 6.05% increase.

Attached for your review is the analysis prepared by the ASC salary committee.

Your review of this material is appreciated. Please contact me if further information is needed.

ljh

xc: Dr. Sidney Ribeau
Mr. Robert Martin
Chair, CSC
Chair, Faculty Senate



Bowling Green State University

Office of Capital Planning
305 McFall Center
Bowling Green, Ohio 43403
(419) 372-8591
Fax: (419) 372-0331

March 6, 1996

MEMORANDUM

To: Administrative Staff Council
From: ASC Salary Committee
Re: 1996 Salary Recommendation

Since work has been undertaken by a joint subcommittee of the Salary Committee and the Personal Welfare Committee to generate a broad recommendation for the award of salary increases, the Salary Committee has concentrated on reviewing the results of the College and University Personnel Association (CUPA) survey of salaries for the institutions in the State of Ohio. This has been a consistent exercise for a minimum of six years, which gives us a reasonable base for comparison and trends. It also makes our recommendation specific to the numbers involved, and expressed solely in a numerical fashion.

As noted in the Executive Summary, the University has lost ground in five of the six versions of salary comparisons, with the most severe loss in Modified Version 3.1. MV 3.1 represents all BGSU CUPA positions found at a minimum of five institutions, less the executive positions and those positions filled by faculty and classified staff. This version has been the version on which we have based our recommendations for the past six years, and has always been recognized as the most appropriate for this purpose by the Administration. MV 3.1 reflected a 2.48% BGSU loss from the state wide average salary from 94-95 to 95-96.

While a change in the Presidency may change the pledged support of the President's Office to bring faculty salaries to the 60th percentile of Category - I Universities, we feel that this remains a reasonable goal, and remains the basis for our goal of attaining the status of 4th out of 11 Ohio comparable institutions considered in our analysis. While we have dropped from 7th place last year to 10th place this year, we are now 2.93% closer to the fourth place institution than we were one year ago. Even with this in mind, with a projected 2.7% rate of inflation for the next year and the assumption that the fourth place University would keep pace with that rate at a minimum, we would need a 6.05% increase to barely move into 4th place. The request for this 6.05% increase is in fact the recommendation of the committee.



Bowling Green State University

Office of Capital Planning
306 McFall Center
Bowling Green, Ohio 43403
(419) 372-8591
Fax: (419) 372-8446

March 6, 1996

MEMORANDUM

To: Administrative Staff Council
From: ASC Salary Committee
Re: 1995-96 Executive Summary

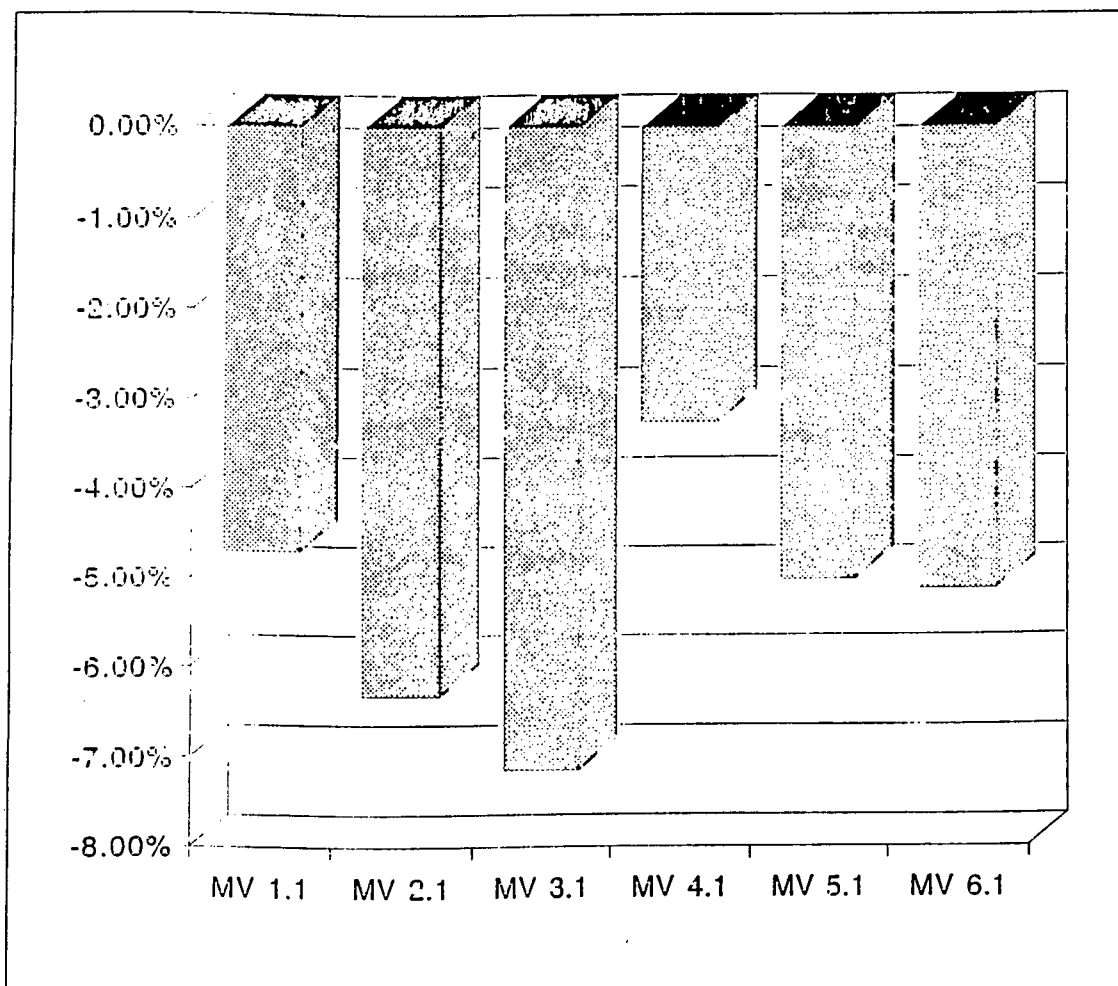
The ASC Salary Committee has consistently analyzed data from the College and University Personnel Association (CUPA) salary survey for the past seven years. On the basis of the data, the following can be said:

- 1) BGSU average salaries when compared to average salaries at similar institutions (Modified Version 3.1) moved from a rank of 7th in 94-95 to a rank of 10th in 95-96. This is a continued drop from the highest ranking achieved in 93-94 of 5th place. (Please see Appendix B)
- 2) BGSU average salaries, when compared to average salaries at similar institutions (MV 3.1) dropped from -4.67% to -7.15% (see Appendix A.1). This is the second year in a row for such a drop, and it represents a 4.32% drop from our highest position in 89-90. BGSU average salaries also dropped in MV 1.1 by .54%, in MV 2.1 by .88%, in MV 5.1 by .98% and MV 6.1 by 1.57%. BGSU did gain .09% in MV 4.1.
- 3) The percentage of BGSU salaries that were more than 10% below the state average for that position increased slightly to 32.63% in 95-96 from 32.14% in 94-95 (see Appendix E). BGSU presently has 14.74% of our positions more than 10% above the state average.

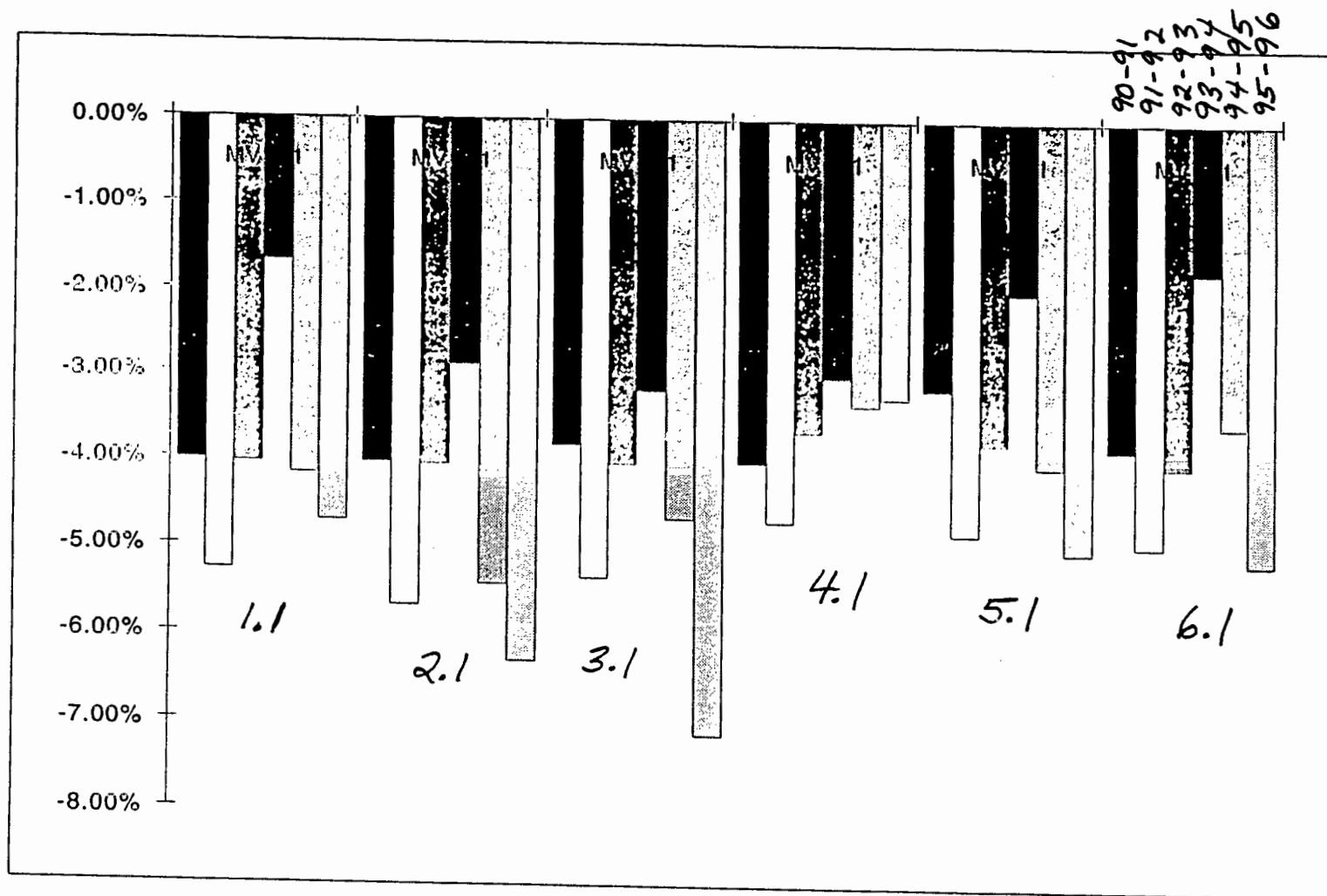
Appendix A
1995-96
Summary of CUPA - BGSU Average Salary
Compared to State Average

| Version | BGSU # of Cases | BGSU Average | CUPA Average | Difference | % Difference |
|---------------|--------------------|-----------------|-----------------|------------------|---------------|
| MV 1.1 | 79 | \$55,946 | \$58,714 | (\$2,768) | -4.71% |
| MV 2.1 | 68 | \$55,054 | \$58,771 | (\$3,717) | -6.32% |
| MV 3.1 | 55 | \$56,199 | \$60,525 | (\$4,326) | -7.15% |
| MV 4.1 | 20 | \$59,537 | \$61,594 | (\$2,007) | -3.26% |
| MV 5.1 | 76 | \$56,057 | \$59,020 | (\$2,963) | -5.02% |
| MV 6.1 | 66 | \$57,076 | \$60,164 | (\$3,088) | -5.13% |

Recommendation based upon MV 3.1

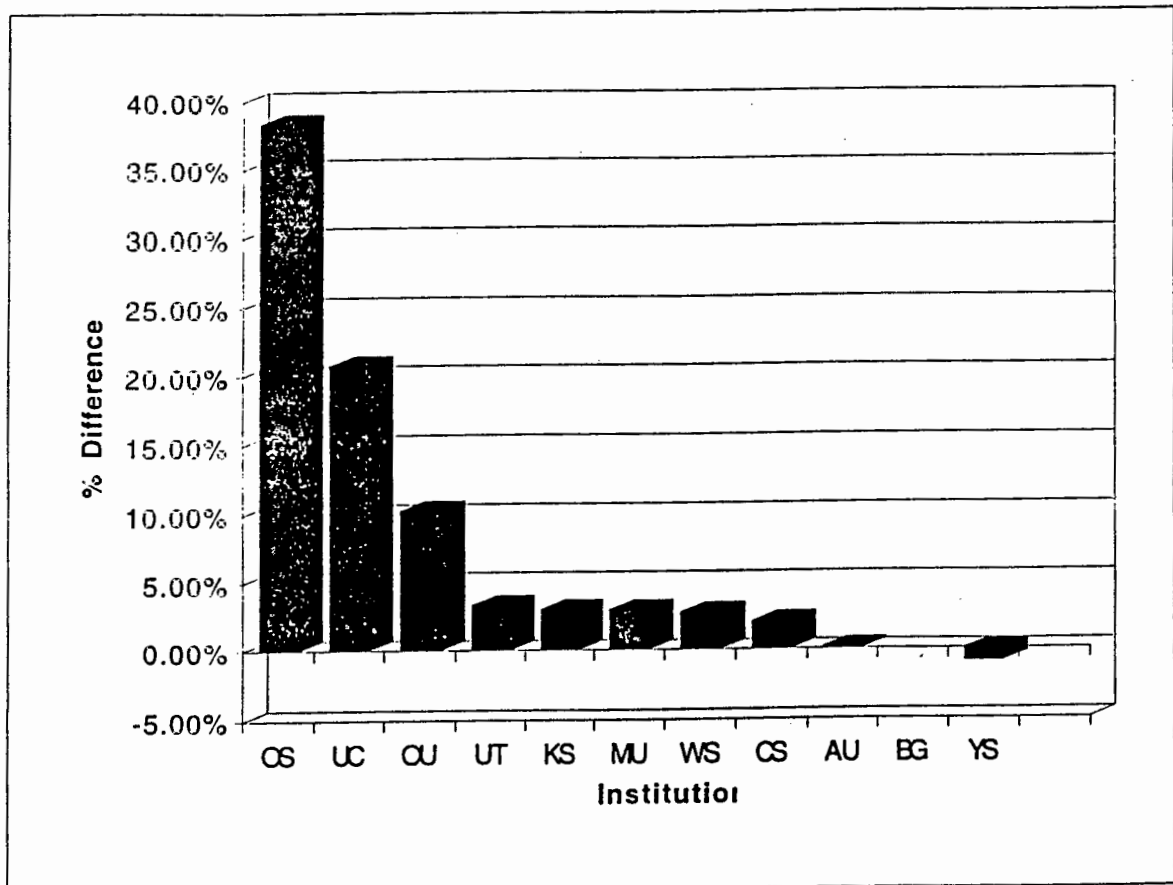


Appendix A.1
 Summary of CUPA - BGSU Average Salary
 Compared to State Average
 Six Modified Versions
 Six Year Comparisons

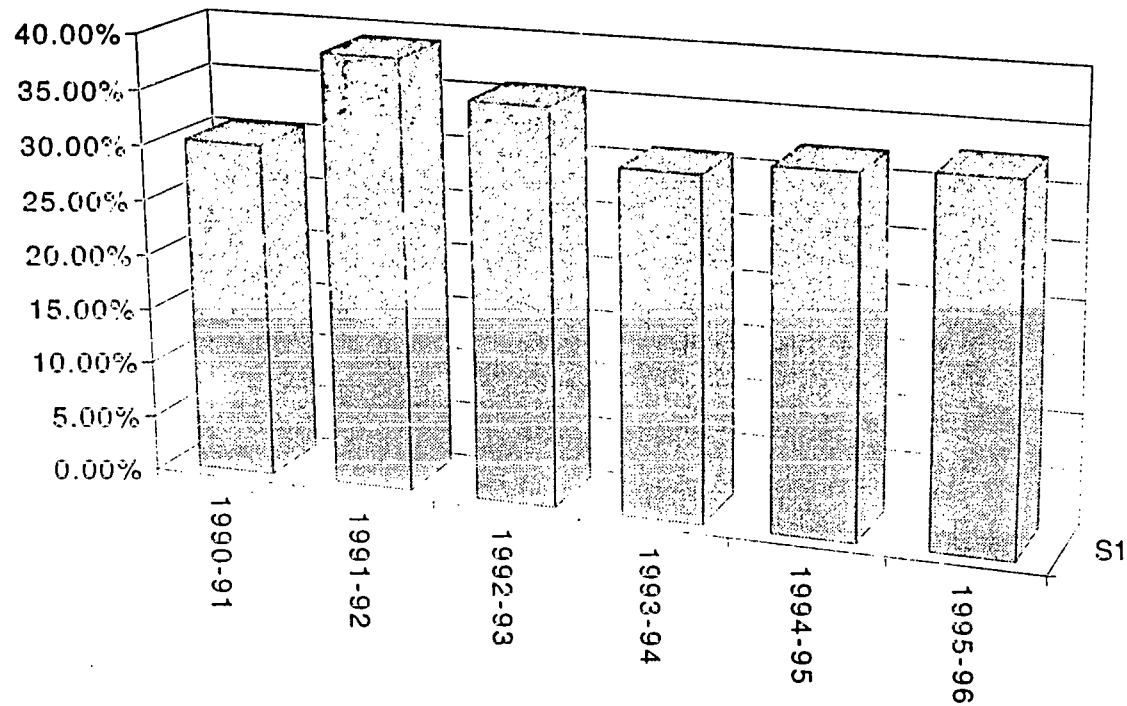


Appendix B
1995-96
**Summary of Comparison of BGSU Salaries
to Other State Schools Using Common Positions
(MV 3.1)**

| School | # of Positions | Average Salary | BGSU Average Salary | Difference | %Difference from BGSU |
|-------------|----------------|----------------|---------------------|------------|-----------------------|
| Ohio State | 44 | \$77,990 | \$56,361 | \$21,629 | 38.38% |
| Cincinnati | 36 | \$73,531 | \$60,893 | \$12,638 | 20.75% |
| Ohio | 39 | \$64,302 | \$58,313 | \$5,989 | 10.27% |
| Toledo | 36 | \$59,946 | \$58,006 | \$1,940 | 3.34% |
| Kent | 46 | \$56,989 | \$55,319 | \$1,670 | 3.02% |
| Miami | 35 | \$59,869 | \$58,150 | \$1,719 | 2.96% |
| Wright | 37 | \$57,425 | \$55,875 | \$1,550 | 2.77% |
| Cleveland | 33 | \$60,333 | \$59,110 | \$1,228 | 2.08% |
| Akron | 38 | \$58,586 | \$58,489 | \$97 | 0.17% |
| BGSU | | | | | |
| Youngstown | 36 | \$53,385 | \$53,893 | (\$508) | -0.94% |



Appendix E
Percentage of BGSU Salaries
Greater than 10% Below the State Average
for that Position
Six Year Comparison





Bowling Green State University

W. Mercer

Office of the President
220 McFall Center
Bowling Green, Ohio 43403-0010
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50

September 13, 1996

MEMORANDUM

TO: ALL BGSU ADMINISTRATIVE STAFF MEMBERS

FROM: Sidney A. Ribeau, President *Sidney Ribeau*

RE: Our New Administrative Staff Compensation Plan

I realize that this message may not reach you for several days because of the complicated logistics required for mailings to large numbers of people, but immediately after our Board of Trustees' meeting today, I write to inform you that the Trustees have adopted the Administrative Staff Compensation Plan. A copy of the basic policies associated with the Plan is attached.

A few comments of my own may be helpful. We have traveled a long and many times arduous road on this "Mercer" journey. However, I think we can now all have pride in the fact that together we have taken this important step forward in assuring that salaries for administrative staff are established and maintained in a fair and equitable manner.

It is extremely pleasing to note that the plan is already having a salutory effect in setting appropriate, equitable entry-level salaries for new hires. It is also very gratifying to know that, effective with their October 1996 paychecks, individuals whose salaries are below the minimums for their new grades will have the planned salary adjustments made, retroactive from January 1, 1996.

I do know, of course, that some of you remain deeply concerned about certain aspects of this plan which the Trustees have now adopted. The leadership of Administrative Staff Council has made this clear to us, as have some of you individually. The chair and chair-elect of ASC have particularly stressed two policy areas in discussions with the administration and the Trustees. I would like to comment briefly on each of them.

- 1) Many of you would like to see a higher guaranteed salary increase for individual staff members who are promoted, temporarily reassigned or reevaluated to a higher grade. The plan guarantees at least 5%, while ASC recommended 10%. The qualifying phrase "at least" is very significant in this context. In the designated circumstances, no salary increase will be less than 5%, but many will be higher, I'm sure, depending on the individual's new responsibilities. Some may be as much as 10% or more, if there are substantial increases in responsibility associated with the new grade and if an affected individual is a person of superior talent and merit.

- 2) Many of you also continue to be concerned about the so-called "caps" policy. The administration and Trustees have been told, for example, that only the administrative staff is being singled out with a restrictive salary policy. This is not true. The salaries of **all** employee groups are restricted in some way, either related to plan design or to market. While it may be true that a very small number of administrative staff could have their salaries temporarily frozen, after the three exemption years, administrative staff members who are highly motivated, skilled and efficient may earn substantial numbers of merit dollars over a period of years. While faculty members also earn merit dollars in the same way, their salaries are always constrained by market forces. Also, of course, in the classified staff salary plan, members cannot earn more than the percentage amounts designated in their annual salary pools.

It is vital that we be honest about our goals. We have established a compensation plan to help guarantee equitable salaries for administrative staff members. If we were to exempt some staff members permanently from the terms of the plan, allowing their salaries to advance beyond the grade maximums--whether by increases to base salary or by bonuses--we would not have an equitable plan. By definition, in that case, we would be guaranteeing some individuals an inequitable advantage over all the rest. We cannot afford to begin our new plan that way.

In addition, I want you to know that I am committed to the position that professional development opportunities and training must be available to our staff. Such opportunities will help mitigate the possible negative effects of salary grade maximums.

As two or three of the Trustees said during the meeting this morning, we now have a plan officially in place, but the details of that plan are not cast in stone. Experience may move us to make changes. We will continue to listen carefully to comments and recommendations from ASC and its leadership. If fine tuning of the plan is needed, I'm confident that it will happen.

I believe that with the help and hard work of many individuals--members of the university administration as well as administrative staff members--BGSU is now positioned to meet some of the difficult challenges facing us both internally and externally. Thanks to all of you who have assisted. The Trustees and I are grateful. We look forward to walking forward together with you on the new road which now lies ahead of us.

ADMINISTRATIVE STAFF COMPENSATION PLAN: RELATED POLICIES

1. Administrative staff members whose salaries are below minimum for grade will have their salaries brought up to minimum. The process by which that will be done is as follows.
 - (a) 1995-96 salaries for all individuals below the minimum for grade, based on the 1995-96 salary table, will be adjusted upward to the minimum, retroactive from January 1, 1996. Salary raises for 1996-97 will then be recalculated and moved upward, based on the adjusted '95-96 salary.
 - (b) A second salary table, time-adjusted for 1996-97, has now been constructed, based on recommendations from Mercer Inc. Individuals whose '96-97 salaries are still below minimum for grade on this new table will be brought up to the grade minimum, retroactive from July 1, 1996.
2. In general, Position Request and Authorization forms for administrative staff new hires will specify salaries with a range from the grade minimum to the midpoint. Listing a salary level higher than the midpoint for grade will require prior approval by the area vice president, after consultation with the offices of Human Resources and Affirmative Action.
3. In the event that a higher grade placement for an administrative staff member results from a revised position analysis, that person is guaranteed at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.
4. If an administrative staff member is promoted to a different position in a higher grade, that person is guaranteed at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.
5. When an administrative staff member is assigned to a position in a higher grade on an interim/temporary/acting basis, the following salary adjustment policy will apply. If the person's service in the new position is longer than 30 calendar days, s/he will receive a premium for the time served equal to at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.
6. In cases where an administrative staff member is demoted to a position in a lower grade, the person's salary will be lowered to a level in the new grade equivalent to his/her level in the original one.
7. In cases where an administrative staff member is transferred, in a lateral move, to another position at the same grade level and requiring approximately the same degree of skill, effort and responsibility, normally the individual's salary will not be adjusted.
8. A special market premium may be established for a particular job title when market conditions exist causing excessive turnover, when a salary level midpoint is well below market average for the job and/or when there is a failure of a current salary range to attract qualified candidates.
9. Beginning in 1997-98, the ranges for each grade will be adjusted in a three-year, recurring cycle. In the first two years of each cycle, the ranges for each grade will move up annually by an amount which is 1% less than the average salary increment paid to administrative staff that year. Every third year, beginning with 1999-2000, the University will conduct a reevaluation of the ranges in light of current market conditions, as well as other relevant factors, and adjust the ranges in light of that reevaluation.
10. BGSU will enforce salary maximums for all administrative staff positions, but it will exempt from the caps for a period of three years those administrative staff employees whose salaries are already above the maximums for their grades. Effective July 1, 2000, the salaries of any staff members still above their maximums will be frozen until such time as those salaries are within range. If at any time during the three years a staff member's salary should fall within range, the exemption ceases to apply to that individual and the maximum will be enforced.

Approved by the Board of Trustees
September 13, 1996

ASC Goals 1994-95

- Participate in the Mercer Group's job analysis and compensation study for administrative staff.
- Seek ways to ensure consistent application of policies relating to the welfare of administrative staff across vice presidential and presidential lines, including annual performance evaluations, merit evaluations, salary adjustments, etc. Continue active participation in development of standard performance evaluation procedure for all administrative staff.
- Continue participation in planning for a university-based day care center; pursue establishment of an advisory committee to assure quality programming and access for all university constituent groups. Pursue Firelands' needs for day care. Examine dependent/elder care (long range).
- Pursue implementation of a clear policy and procedure for addressing wage issues: market adjustments, promotion, equity adjustments, gender inequities, etc. Distribute the approved procedures to all staff.
- Secure an overall salary and benefit package that ranks BGSU's administrative staff in the number four position or higher statewide. Review and make recommendations on future distribution of salary pool with particular attention to how the merit is awarded i.e. dollar amount vs. percentage split.
- Address issues related to increased workloads, e.g., development of interim/acting appointment pay scales and the possibility of alternative means of compensation/recognition.
- Work with Personnel on the issue of Administrative Staff fringe benefits with a view to equalizing some benefits among employee groups e.g., examine consistency of policy with regard to maternity leave, unpaid leave, family leave, benefits for couples when both are employed by the university.
- Establish procedures within ASC for handling policy proposals within an appropriate time frame including those which require Administrative Council action; establish a mechanism for follow-up including determination when to drop a proposal.
- Expand communication links among administrative staff; explore potential for e-mail, interest groups, networks for staff members of similar expertise or interest; find ways by which administrative staff can help one another in the workplace; examine ways to improve representative/constituent contact including the way Council elections are held.
- Seek to establish professional development funds to allow for staff participation in professional development opportunities.
- Examine staff development leave potential and develop recommendations/criteria for paid professional leave for administrative staff.
- Continue to raise funds to meet the goal of \$35,000 or more for the scholarship corpus.
- Participate in presidential search process on behalf of administrative staff.

Approved ASC Executive Committee 9/27/94
 Approved Administrative Staff Council 10/6/94



Bowling Green State University

Administrative Staff Council
Bowling Green, Ohio 43403-0373

October 13, 1994

Memorandum

To: Administrative Staff
From: Pat Green, Chair
Administrative Staff Council

This has been a very busy fall for administrative staff! A lot of exciting things are happening, and I wanted to update you on the following:

- Position Analysis Study

The University has contracted with William M. Mercer, Inc. to conduct a title/compensation study of all administrative positions with the exception of the vice presidents. This is an essential study, and one that ASC endorsed last year. It is a great opportunity to accurately title positions and to place administrative staff in appropriate salary ranges. This study should rectify market and gender inequities; establish guidelines for titles and salaries for new positions; create position descriptions for everyone; and establish policies and procedures for promotions and changes in duties. A steering committee of administrative staff members will be working with the Mercer Group at various points along the way to make sure the study meets the particular needs of staff at BGSU. I urge everyone to take the time to complete the survey as thoroughly as possible. This is a perfect chance to rectify many of our concerns about administrative staff positions. If you have any questions or concerns as the study proceeds, please contact me, another member of the steering committee or Personnel. The Personnel Welfare Committee of ASC will also be involved in monitoring the study. Duane Whitmire, chair of PWC, is on the steering committee.

- Child Care Facility

The Board of Trustees approved a draft of a lease with WSOS Community Action Inc. to build a family development/head start facility on University land. A provision of the lease calls for a separate agreement with WSOS to pursue joint development of a child care facility/program for University faculty, staff and students. The development of the child care facility is contingent on the University receiving some state funding for this purpose. The outcome of the funding situation should be known later in the semester. If funds are available, an addition will be constructed on the WSOS facility for University child care. The Board of Trustees is committed to negotiating a child care agreement for BGSU that best serves the interests of students, faculty and staff.

- Health Care Update

Following is the breakdown of administrative staff in each of the health care plans as of September 20, 1994: 120 in Plan 1; 8 in Plan 2; 13 in Plan 3; and 258 in the PPO. We have been invited to spend an afternoon at St. Vincent's Medical Center for lunch and an overview of their programs and services. Five administrative staff can attend. If you are interested, let me know right away. No date has been set, but it is expected to be in October.

- Professional Development Institute

The University, The University of Toledo, and Eastern Michigan University are in the process of formalizing a Professional Development Institute "to enhance skills in our professional staff that

5. Job Analysis/Mercer Group

A lot of questions have been raised by administrative staff regarding the Mercer Study. Following are concerns expressed to me that I would like Council to address:

- Why hasn't the administration told us this study is being conducted as a result of the Department of Labor audit?
- Will administrative staff have the chance to meet with representatives of the Mercer Group to ask questions?
- Will this be used to eliminate positions?
- Can I possibly be demoted?
- Does President Olscamp's commitment to address issues of gender inequity apply to situations that are discovered by the Mercer Group?
- How will the final results be presented and what is the timetable?
- Several persons felt that three weeks was way too short a time to adequately complete the job analysis. It took some persons from 5-10 hours.
- The word "staff" used in the analysis needed to be more clearly defined. There is student staff, administrative staff, volunteer staff and consulting staff.
- It has been stated that if salary inequities are discovered there is no guarantee that there will be any adjustments made. How can that be? Will there be a plan created to correct these inequities over time? If adjustments are made, will the money come from the overall salary pool, thus reducing everyone's salary?
- If someone is at the top of the salary range, does that mean that person will not get any increase - even cost of living?
- When persons reach the top of the range, does it mean they will never get an across the board or merit again?
- How does a person move within a salary range - by across the board and merit? - by promotion?
- How does a person move to another category having reached the top of the range?
- What does the administration hope to achieve by this study? What has the Department of Labor indicated they want from the University?
- Can there be focus groups to discuss these issues as the process moves along?
- Should persons in the process of seeking market/equity adjustments wait for the outcome of the Mercer study?

Chair Report:

Pat Green sadly reported that Gwen Ohlinger passed away suddenly on Monday.

In order to submit our salary requests on time, the rest of the agenda was by-passed to allow the salary committee to present their report. For the full report, call your ASC representative.

Salary:

See attached Executive Summary. There was much discussion about whether a portion of the raise would be lump sum or a percentage. A lump sum benefits those with lower salaries. It was suggested that perhaps the Mercer Study will help raise seriously low salaries. More discussion needs to be held to determine what the administrative staff consensus is on this issue.

Meeting adjourned at 3:15 p.m.

Respectfully submitted,



ADMINISTRATIVE STAFF COUNCIL

SALARY COMMITTEE

1994-95 REPORT

EXECUTIVE SUMMARY

The ASC Salary Committee has consistently analyzed data from the College and University Personnel Association (CUPA) salary survey for the past five years. On the basis of the data, the following can be said:

1) In terms of ranking, BGSU average salaries when compared to average salaries at similar institutions (Modified Version 3.1) moved from 8th in 92-93 to 5th in 93-94 and in 94-95 BGSU dropped to 7th position (see Appendix E). This follows a ranking of 9th in 91-92 and 6th in both 89-90 and 90-91.

2) BGSU average salaries, when compared to average salaries at similar institutions (MV 3.1) decreased slightly to -3.73% as compared to -3.20% in 93-94; -4.04% in 92-93 and -5.35% in 91-92, which had progressed downward from -2.83% in 89-90 and -3.83% in 90-91 (see Appendix A.1).

3) The percentage of BGSU salaries that were more than 10% below the state average for that position dropped further to 32.14% in 94-95 from 30.91% in 93-94.

ASC APPEALS COMMITTEE POLICY STATEMENT

The ASC Appeals Committee shall be composed of 7 members representative of all vice-presidential areas. The purpose of the ASC Appeals Committee shall be to review all appeals by administrative staff concerning their assigned level as a result of the position analysis and compensation study. The committee will perform the review before the individual area Vice Presidents make their initial comments. The goal of the committee shall be to ensure that the appeals process is objective, consistent, and equitable. To accomplish this goal, the committee should adhere to the following guidelines:

- 1) The committee shall receive adequate training concerning how to utilize the criteria contained in the job evaluation plan developed by Mercer, Inc.
- 2) The committee shall focus their review of appeals to the ~~criteria~~^{category} selected by the appellant.
- 3) The review shall be restricted to those comments offered by the appellant or their immediate supervisor (s).
- 4) The committee shall clarify any information submitted for consideration. This would include contacting the appellant or their immediate supervisor(s).
- 5) The committee shall report their decision and/or rationale in writing to the appellant and the VP.
- 6) The committee shall not consider the resulting points, ranges, salary levels, or placement in the organizational chart when determining the appropriateness of an appeal.
- 7) Personnel Services shall provide the administrative support for the committee.
- 8) The actions and deliberations of the committee should be kept in confidence by members.
- 9) The appellant shall be informed in writing of the outcome of the appeal process along with written justification from both the appeals committee and vice presidents. All documentation associated with the appeal shall be made available to the appellant.

Bryan Benner, Chair 9/5/96
ASC

Robert L Martin, 8:11 AM 10/10/...,ASC request - Compensation study

1

Date: Tue, 10 Oct 1995 08:11:23 -0400 (EDT)

From: Robert L Martin <rmartin@bgnat.bgsu.edu>

Subject: ASC request - Compensation study

To: executive council <cdalton@bgnat.bgsu.edu>, eclark@bgnat.bgsu.edu, ewhipple@bgnat.bgsu.edu, lbarber@bgnat.bgsu.edu, pmason@bgnat.bgsu.edu, saribeau@bgnat.bgsu.edu

cc: personnel <jmoore@radar.bgsu.edu>

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f ASC

John Moore and I met with Bryan Banner, Chair of ASC yesterday to discuss their requests relating to the Compensation study. Many of the issues we are already prepared to deal with such as the list of remaining policies. Their key issues remain

1. Full disclosure of all of the rating activities including the shifts in grade resulting from the Advisory committee and VP council reviews.
2. Full disclosure of the model used to extend an individuals factor rating to total points and the point total required for each grade.
3. A small committee of neutral contract employees, representing every VP area to review appeals and make recommendations to the VP council for final decisions. Recourse beyond that point to be use of the grievance procedure only.
4. A meeting between the VPs and ASC Exec council (approx 1 hour) to share views of both prior to moving forward in the appeal process.

I'll be looking forward to your opinions at the meeting fri at 3:00PM.

**Draft of Administrative Staff Council Response
to 10-12-95 Document from the Vice Presidents**

Prepared by

**ASC Executive Committee and
ASC Personnel Welfare Committee**

Contents

- 1) Cover Memorandum**
- 2) Original 10-12-95 Draft from the VP Council**
- 3) Draft of ASC Response - Summation of Points**
- 4) ASC Response (Final Date to be Determined)**

Date

February 26, 1996

Cover Memorandum (Draft)

To: Les Barber, Executive Assistant to the President
Eloise Clark, VP for Academic Affairs
Chris Dalton, VP for Planning and Budgeting
Nancy Footer, General Counsel
Robert Martin, VP for Operations
Phil Mason, VP for University Relations
John Moore, Assistant VP for Human Resources
Sidney Ribeau, President

Final Date
(Current Date =
February 26, 1996)

From: Administrative Staff Council

Subject: Response to the Vice President Council's Administrative Staff
Compensation Policy Document

As you requested, attached are Administrative Staff Council's responses to the enclosed Vice President Council's Administrative Staff Compensation Policy document dated October 12, 1995. You will note that Administrative Staff Council has responded to each of the 18 items that were presented.

Because the University is in the process of revising Administrative Staff Position Analysis and Compensation Policies, it is imperative that we include all policies related to staff compensation. Therefore, the response includes our recommendations for items (6 additional) not discussed in the original document but essential to future policies and procedures for Administrative Staff. The majority of our recommendations are based on the Discussion Guide on the Development of Policies and Procedures presented by Mercer for Bowling Green State University, March 1995. We look forward to working with you on these policies and procedures.

ADMINISTRATIVE STAFF COUNCIL RESPONSE - FINAL DATE
SUMMATION OF POINTS
(current date = February 26, 1996)

| <u>Point #</u> | <u>Description</u> | <u>Status</u> |
|----------------|----------------------------------------------|---------------------------------|
| 1 | Full disclosure | Accomplished |
| 2 | Appeals process | In-progress |
| 3 | Additional training | Accomplished |
| 4 | Additional information | Accomplished |
| 5 | Appeals form | Accomplished |
| 6 | Positions not in original study | In-progress |
| 7 | Administrative positions on faculty contract | Agreement |
| 8 | Pay below the minimum | Agreement and Recommendation |
| 9 | Salary caps | Agreement and Recommendation |
| 10 | Annual salary adjustments | Agreement |
| 11 | New employees hired at the minimum | Disagreement and Recommendation |
| 12 | Position Reevaluation | Disagreement and Recommendation |
| 13 | Promotion | Disagreement and Recommendation |
| 14 | Appeals Process vs. Position Reevaluation | Disagreement and Recommendation |
| 15 | Titles | Agreement and Recommendation |
| 16 | Position Evaluation Process | Disagreement and Recommendation |
| 17 | Review of Grade/Salary Chart | Disagreement and Recommendation |
| 18 | Interim/Temporary/Acting Appointments | Disagreement and Recommendation |

NEW POINTS

| | | |
|----|------------------------------------|---------------|
| 19 | Progression Through a Salary Level | New Procedure |
| 20 | Upgrade to Another Salary Level | New Procedure |
| 21 | Demotion | New Procedure |
| 22 | Downgrade | New Procedure |
| 23 | Transfer | New Procedure |
| 24 | Market Exceptions | New Procedure |

ADMINISTRATIVE STAFF COUNCIL RESPONSE - FINAL DATE
(current date = February 26, 1996)

Administrative Staff Council has been working on responses to the **ADMINISTRATIVE STAFF COMPENSATION VP COUNCIL** document dated October 12, 1995. As a result of feedback from Administrative Staff Council, several of the points presented in your draft have been addressed --points 1, 2, 3, 4, and 5 (full disclosure, appeals process, additional training, additional information, and appeals form). We appreciate the cooperation of the administration in expediting this part of the process.

The balance of this document addresses points 6 through 18 and contains our recommendations. In addition, we have included points 19 through 24 that are essential in completing a comprehensive revised Administrative Staff Handbook. The majority of our recommendations are based on the Discussion Guide on the Development of Policies and Procedures presented by Mercer for Bowling Green State University, March 1995. The Administrative Staff Council looks forward to working with you on these policies and procedures.

ADMINISTRATIVE STAFF COMPENSATION
VP COUNCIL - 10-12-95

Attending: Martin, Mason, Dalton, Clark, Barber, Footer

1. It was agreed that "Full Disclosure " of processes and study results was desirable within the bounds of customary personal data limitations. Forms describing the rating factors and their associated points, the formulas for extending the ratings to total points, Point ranges assigned to each grade, and salary ranges for each grade will be made available. Job Factor Ratings and total points assigned for each position can also be reviewed in the Personnel Office and will be made available to departmental offices.

ASC Response -Thank you for opening up the channels of communication regarding full disclosure. We hope the full disclosure concept will be carried forward through the appeals process and thereafter.

2. The appeal process will be expanded to include an administrative staff appeal committee appointed by ASC.

- A. Members will include one representative each from every Vice Presidential Area, Office of the President (ICA suggested), and two representatives from Academic Affairs.
- B. Members should not include those having filed appeals.
- C. Members should not have been previously assigned to the Advisory Committee for the Mercer Study.

ASC Response-We have identified members to serve on the appeals committee, and we developed the ASC APPEALS COMMITTEE POLICY STATEMENT and the ASC APPEALS COMMITTEE FORM for committee members to follow.

3. Agreed that additional training should be offered to administrative staff employees and supervisors/managers covering the methods, forms and formulas used to extend job factor ratings to total points and grades. Personnel to schedule, advertise and conduct within next two weeks.

ASC Response-Thank you for holding the informational sessions.

4. Agreed that information needs to be distributed describing the three different groups involved in the rating/grading process emphasizing that they were all part of a sequence of steps to arrive at a final grade for each position. The results of each step for a particular employee would be made available to that employee should he/she seek that information. Since each evaluation was a collective process, written rationale for the results of each step is not available. Further emphasis was recommended in informing employees that the results of intermediate steps in no way affected their appeal process or its consequences. The final step was the step from which appeal information should be presented.

ASC Response-The Progression of Levels document was helpful to people in preparing their appeals, but some of the data was inaccurate and the column titles were misleading. For example, the first column entitled Mercer led staff to believe that the entire column had been determined by Mercer consultants. Also, the second column entitled Committee implied that the Committee reviewed all positions which was not the case.

5. The restrictions included in the instructions on the appeal form may be overly restrictive. If additional space is needed to present information that is essential to the basis for the appeal, the reverse side of both pages one and two of the appeal form can be used. A revised Position Questionnaire is also acceptable.

ASC Response-Additional space was helpful to those appealing, but the approach of submitting a revised Position Questionnaire is beyond the scope of the original intent of the appeals process. Originally, Position Questionnaires are to be used only when a position is to be reevaluated.

6. The positions that were not included in the original analysis should be graded by Personnel Services as soon as time is available utilizing the questionnaire and supervisory/vice president reviews similar to the original process. Grade/Rating recommendations would be forwarded to the Area VP then VP Council. The resulting recommendation would be returned to the employee for an appeal opportunity. Additional information submitted through the appeal process would follow the same steps as the original appeal process for all first time submissions within six months of the implementation date adopted by the Board of Trustees. Appeals submitted subsequent to the six month period would follow policies adopted as a part of the Compensation Plan.

ASC Response-We seek clarification of the status of positions that were not included in the original analysis. Those positions that have not been analyzed yet should be completed immediately. The people in these positions have still not been notified as of February 21, 1996. Any administrative staff position not included in the original analysis should be given the same appeal opportunity as those included in the original study. Anyone who desires to appeal must do so within 30 days of receipt of notification of their grade level from Personnel. The Appeals Committee will remain intact for a reasonable period of time that is yet to be determined by Personnel, the administration, and Administrative Staff

Council. Once the Appeals process has been completed, the Position Reevaluation process will begin as outlined in point 12.

7. Administrative positions normally held by individuals on faculty contracts are excluded from rating/grading by the Administrative Staff Compensation Plan. Administrative positions currently held by individuals on faculty contracts which could be assigned to administrative positions in the future will not be rated/graded until such time as that position is expected to become vacant and replacement with administrative contract employee is begun.

ASC Response-This seems logical, and it is our belief that rating/grading of positions in the future by Personnel will add consistency to this system as it evolves.

8. If an employee's salary is below the minimum for the assigned grade, it will be adjusted to the minimum effective Jan. 1, 1996.

ASC Response-We agree whole-heartedly. In addition, we believe those positions that fall between the minimum and the midpoint need to be carefully examined for possible salary inequity/discrimination. The Mercer consultants indicated that progression from minimum to midpoint should typically take four to seven years.

9. No current employee's salary will be capped as a result of the implementation of the Compensation Study.

ASC Response-Not only should no current employee's salary be capped; it is our recommendation that no future administrative staff employee's salary should be capped.

10. An individual employee's salary will be adjusted annually through the usual procedure with across the board and merit raises, if applicable, as approved by the Board of Trustees.

ASC Response-We agree.

11. It is the intent of the University that adoption of this compensation plan will normally result in new employees at the minimum salary for the appropriate grade. Variances from this practice based on special departmental needs, market factors, individual qualification, etc., may be approved by area vice presidents after consultation with the Offices of Personnel and Affirmative Action.

ASC Response-If the intent of the University is to hire new employees at the minimum, BGSU runs the risk of developing a pool of applicants that will be lacking in both quantity and quality. New positions should be posted with a salary range from minimum to midpoint. Anything above the midpoint should be considered a variance needing vice presidential approval after consultation with the Offices of Personnel Services and Affirmative Action.

12. In the event that significant changes in duties and responsibilities occur, individuals may initiate a request for reevaluation of their position. A revised questionnaire will be

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submitted through the same process as existed during the initial phase of the project. Management reviews, personnel grading and appeal processes will be the same as those submitted subsequent to the six month post implementation period.

- A. If a higher grade results, the salary will be adjusted to the minimum of the new grade or an increase of 5% whichever is greater.

- B. If a higher grade does not result, no salary adjustment will occur.

ASC Response - We recommend the implementation of the following procedures for position reevaluation. In addition, we concur with the Mercer consultants recommendation that the standard adjustment for significant changes in duties and responsibilities should be 10 percent.

Definition of Position Reevaluation: the formal review of positions at designated intervals for purposes of ensuring that current duties and responsibilities are being appropriately reflected in the position's salary level.

Recommendation:

Positions can be reevaluated within each department upon the request of the incumbent or supervisor, but also all positions will be reviewed regardless of request at least once every four years. Review of one quarter of the positions per year would include all of the employee or supervisor initiated requests for reevaluation.

Process For Reevaluation at Request of Employee or Supervisor

1. Once a year, at any time, an employee or supervisor may request an evaluation of a position to ensure the current duties and responsibilities are appropriately reflected in the position's salary level.
2. A memorandum and completed position analysis form should be forwarded to Personnel Services for evaluation based on the established guidelines.
3. Personnel Services will review the position within 30 days based on the established criteria. If there are questions about the position, Personnel Services can request an interview with the employee and the immediate supervisor.
4. Personnel Services will forward the results of the analysis to the employee, the supervisor and department head, dean or director and vice president regardless of who initiated the request.

Process For Personnel Initiated Reevaluation

1. Personnel Services should establish a system to evaluate one quarter of the positions each year.
2. Employees in those positions to be evaluated will be asked to complete a position analysis form within a 30-day period.

3. These positions will be reviewed by Personnel within 30 days, and the results of the review will be forwarded to the employee and supervisor, dean, director and vice president.

Process For Both Situations Above

1. Positions which are determined by Personnel to fall in a lower salary level due to decreased responsibilities may be appealed by either the supervisor or the appellant. Salaries will remain the same. (See Downgrade policy)

2. Positions determined by Personnel to fall in a higher salary level should receive the increase in salary in the subsequent pay following Personnel's completion of the review.

13. If an employee is promoted to a position in a higher grade, the salary will be adjusted to the minimum of the new grade or a 5% increase, whichever is greater.

ASC Response - We agree that when an employee is promoted there should be a salary increase; however, the increase should be based on 10 percent or should be based on fair market value whichever is greater.

Definition of Promotion: occurs when an incumbent moves from a position requiring a certain level of skill, effort and responsibility to a vacant or newly created position at a higher salary level requiring a significantly greater degree of skill, effort and responsibility.

14. All appeals are initiated by submitting a new Position Questionnaire to the immediate supervisor, then to the department/division/unit heads then to Personnel Services.

A. Initial appeals submitted during implementation or within six months thereafter are forwarded to the ASC Appeal Committee then the area VP and finally the VP Council for final determination.

B. Appeals submitted after the above periods are forwarded from Personnel Services to the area VP for final determination.

ASC Response: The current appeals process is for transitional purposes only. In the future, individuals will follow the procedures for position reevaluation as outlined in point 12.

15. Title revision will not be included as a part of the implementation of the Compensation Study at this time.

ASC Response - We agree. However in the future when a title change is requested, the position would be reevaluated; and if necessary, the title would be adjusted to reflect the duties and responsibilities of the position. Even when a major divisional reorganization occurs, the position reevaluation process as outlined in point 12 should be followed.

16. When new positions are created or existing positions become vacant, revised questionnaires, if appropriate will be prepared by management and submitted to Personnel for grading.

A. During initial implementation plus six months, Personnel will forward grade recommendations to the area VP, through the ASC Appeal Committee, then to VP Council for final determination

B. After the above period Personnel will forward grade recommendations to the area VP for final determination.

ASC Response - We recommend the implementation of the following procedures for position evaluation.

Definition of Position Evaluation Process: the method whereby vacant or newly established positions are evaluated and assigned to salary levels to establish equity within the organization.

Recommendation:

Evaluations of positions will be handled by Personnel Services in consultation with the hiring official.

Process:

1. When a position becomes vacant or is newly created, the hiring official meets with Personnel Services to review the position responsibilities for accuracy of placement in a salary range and title. Any corrections should be made at this time.

2. The hiring official should be advised at this time of the appropriate salary range for the position.

3. The Position Opening Request & Authorization (PORA) form should be routed as usual. Any recommended changes to the position from a dean, director or vice president should be discussed with Personnel Services and the hiring official to reach consensus prior to the posting of the position.

17. The Administrative Staff Compensation Plan Grade/Salary chart will be reviewed at least every 5 years by the Personnel Services Department to determine its adequacy in meeting market equity. These reviews will be patterned after guidelines provided in the final report from Mercer Inc. and adjustments made as results dictate in minimum, mid-range, and maximum pays for each grade. Annual adjustments to these pay charts will not be automatically made based on annual Board of Trustee approved employee pay increases.

ASC Response: We believe that administrative staff should not be penalized by a review of the Grade/Salary chart every 5 years instead of an annual review. We believe that the Grade/Salary chart should be adjusted each year that there is to be a general salary increase. This is necessary so that administrative salary levels are raised in an amount equivalent to the other constituent groups' increases each year.

18. When employees are assigned to positions in a higher grade on an interim/temporary/acting basis, a salary increase will be established by the area VP after consultation with the Offices of Personnel and Affirmative Action.

ASC Response: We recommend the implementation of the following procedures for interim/temporary/acting appointments.

Definition of Temporary Upgrade/Interim Appointment: occurs when an administrative staff member is asked to serve any period longer than 4 weeks in a position which has a higher salary level

Recommendation:

Increase salary by 10 percent or to the minimum of the temporary salary level, whichever is greater.

At the end of the appointment the employee will return to his/her original salary plus any raises received during the time of the temporary appointment.

After 26 weeks Personnel Services will review the arrangements.

Although the following points were not included in the original ADMINISTRATIVE STAFF COMPENSATION VP COUNCIL document dated October 12, 1995, the inclusion of these policies and procedures in the revised Administrative Staff Council Handbook are essential. Once again, these recommendations are based on the Discussion Guide on the Development of Policies and Procedures presented by Mercer for Bowling Green State University, March 1995.

19. Progression Through a Salary Level

Recommendation:

Progression through a salary level is an important issue that is under review by the Administrative Staff Council's Salary Committee and Personnel Welfare Committee in consultation with Personnel Services. Recommendations will be forthcoming.

20. Upgrade to Another Salary Level

Definition of Upgrade to Another Salary Level: occurs when a position is reevaluated resulting in a higher salary level as a result of a significant expansion in the position's existing duties and responsibilities.

Recommendation:

Increase salary by ten percent or to the minimum of the new salary level, whichever is greater.

21. Demotion - Definition of Demotion: occurs when an incumbent moves from a position requiring a certain level of skill, effort and responsibility to a vacant or newly created position assigned to a lower salary level requiring a significantly lesser degree of skill, effort and responsibility.

Recommendations:

Demotion is an issue that will be reviewed by the Administrative Staff Council's Personnel Welfare Committee in consultation with Personnel Services. Recommendations will be forthcoming.

22. Downgrade - Definition of Downgrade: occurs when a position is reassigned to a lower salary level as a result of a significant reduction in the position's existing duties and responsibilities.

Recommendation:

Maintain incumbent's current pay.

23. Transfer - Definition of Transfer: a lateral move which results when an employee is moved from a position requiring a certain level of skill, effort and responsibility to another position requiring the same degree of skill, effort and responsibility and assigned to the same salary level.

Recommendation:

Maintain incumbent's current pay.

24. Market Exceptions - Definition: A special premium which is established for a particular job title when unusual market conditions exist causing excessive turnover, salary level midpoints well below market average, and/or failure of current pay to attract qualified candidates.

Recommendation:

Move the pay range upward (i.e. minimum, midpoint and maximum) by a percentage equal or comparable to the percentage difference between the documented market average pay for the job and its current midpoint value; subject to periodic review to determine appropriateness of premium.

Personnel Services will determine if market exceptions exist and conduct the review process.



Bowling Green State University

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May 22, 1996

MAY 23 1996

MEMORANDUM

VICE-PRESIDENT
PLANNING AND BUDGETING

TO: Dr. Sidney Ribeau, President

FROM: Judy Donald, Chair *Judy Donald*
Performance Appraisal Committee

SUBJ: Timeline-Performance Appraisal Process

Thank you for the opportunity to address the Ad Council last week regarding the results of the recent survey sent to Administrative Staff regarding performance appraisal.

As you requested, the enclosed is a timeline addressing the activities that the committee will be doing for the coming year. I will keep you informed of our progress during the stages of this process.

Should you have any questions or concerns, please feel free to contact myself or any of the committee members.

Thank you.

pc: Vice Presidents
Performance Appraisal Committee

TIMELINE FOR PERFORMANCE APPRAISAL COMMITTEE

| <u>Timeframe</u> | <u>Activity</u> | <u>Outcome</u> |
|------------------|------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| 5/96-8/96 | Review 40 adm job descriptions | Identification of common performance dimensions |
| 9/96 | Provide ASC rough draft of form/process | Review and feedback |
| 9/96 | Meet with Ad Council | Review and feedback |
| 9/96-12/96 | Preview proposed system | Make sure form/process fits variety of dimensions of ASC jobs |
| 1/97-4/97 | Work with Training Director | Produce manual/procedures. |
| 4/97-5/97 | Mandatory training | All administrative staff/supervisors attend mandatory training |
| 7/97 | Performance appraisal system in place for the 1997/98 year | |
| 7/97-5/98 | Survey staff/supervisors | Provide feedback on use of new procedures, provide avenue to revise as procedures change. |



Bowling Green State University

Administrative Staff Council
Bowling Green, Ohio 43403

7/15

July 12, 1996

Joan Morgan
Sorry I'll be
on vacation and hence
unable to attend

JUL 15 1996

Chris Dalton VICE - PRESIDENT
PLANNING AND BUDGETING

MEMORANDUM

AS 7/16

TO: Lester Barber, Executive Assistant to the President
Bryan Benner, Interim, Director of Human Resources
✓ J. Christopher Dalton, Vice President, Planning and Budgeting
Nancy Footer, General Counsel
Peter M. Hutchinson, Associate Vice President for Academic Affairs
Robert Martin, Vice President, Operations
Charles Middleton, Vice President, Academic Affairs
John C. Moore, Interim Vice President, University Relations
Sidney Ribeau, President
Edward Whipple, Vice President, Student Affairs

FROM: Joan C. Morgan, Chair Administrative Staff Council *Joan*

RE: Issues Related to the Administrative Staff Compensation Plan

"Why are we (administrative staff) being singled out?"
"Salary caps discourage longevity/loyalty."
"How can we believe anything they (the administration) say?"
"What does all this mean?"
"What about movement of the levels?"
"Why are the VP's (and other selected administrative staff groups) being left out?"

These are a few of the direct quotations received from members of administrative staff after they read the memorandum dated June 24 from President Ribeau and the Vice Presidents. As you can see there is a great need to both define and communicate with administrative staff regarding the recent developments with the Administrative Staff Compensation Plan.

Because of this need the Executive Committee of ASC, in the spirit of "Building Community", is extending an invitation to you to attend our next meeting at noon on July 22 in the Library Conference Room. Should you be able to attend, please feel free to bring your lunch.

At this meeting we would like to discuss the following issues.

1. A definition of salary maximums or caps. Two questions related to this that need to be answered include:
 - a. If salary maximums are adopted, can current employees be grandfathered?
 - b. Will across the board raises be automatic for all administrative staff including those who have reached their maximums?
2. Will the Grade/Salary chart be adjusted on an annual basis?
3. What criteria will be used to move employees through the salary levels?

Discussing these issues is important, and as we move toward resolution it is essential that we communicate developments with our constituents.

For your information, I have attached three points from the document you received earlier this year entitled "Draft of Administrative Staff Council Response to 10-12-95 Document from the Vice Presidents." These three points, 17, 10 and 9, relate to the issues we would like to discuss on the 22nd. We look forward to meeting with you at noon on July 22.

cc: ASC Executive Committee

Attachment

Points 17, 10 and 9 from Draft Document

The first statement in each point was made by the Vice Presidents and is followed by the response from Administrative Staff Council.

17. The Administrative Staff Compensation Plan/Salary Chart will be reviewed at least every five years by the Personnel Services Department to determine its adequacy in meeting market equity. These reviews will be patterned after guidelines provided in the final report from Mercer, Inc. and adjustments made as results dictate in minimum, mid range and maximum pays for each grade. Annual adjustments to these pay charts will not be automatically made based on annual Board of Trustee approved employee pay increases.

ASC Response: We believe that administrative staff should not be penalized by a review of the Grade/Salary chart every five years instead of an annual review. We believe that the Grade/Salary chart should be adjusted each year that there is a general salary increase. This is necessary so that administrative salary levels are raised in an amount equivalent to the other constituent groups' increases each year.

10. An individual's salary will be adjusted annually through the usual procedure with across the board and merit raises, if applicable, as approved by the Board of Trustee.

ASC Response - We agree

9. No current employee's salary will be capped as a result of the Compensation Study.

ASC Response - Not only should no current employee's salary be capped, it is our recommendation that no future administrative staff administrative staff employee's salary should be capped.

JCM/nm



Bowling Green State University

Administrative Staff Council
Bowling Green, Ohio

July 26, 1996

JUL 30 1996

VICE - PRESIDENT
PLANNING AND BUDGETING

MEMORANDUM

TO: Sidney Ribeau, President
Lester Barber, Executive Assistant to the President
Bryan Benner, Interim Director of Human Resources
✓ J. Christopher Dalton, Vice President, Planning and Budgeting
Nancy Footer, General Counsel
Peter M. Hutchinson, Associate Vice President for Academic Affairs
Charles Middleton, Vice President, Academic Affairs
John C. Moore, Interim Vice President, University Relations
Edward Whipple, Vice President, Student Affairs

FROM: Joan C. Morgan, Chair, Administrative Staff Council

RE: July 22 meeting

The Executive Committee of Administrative Staff Council was glad that so many of you were able to join us on July 22. We felt the meeting was productive since it became clear that we are struggling with many of the same issues as you are. We agree with the premise that maximum salaries cannot be dealt with until decisions related to the movement of pay ranges are made. It is clear that as the salary table moves, so will the minimums and maximums. One issue related to movement of pay ranges concerns the current table which many of us received in the fall of 1995. Movement of this table did not occur when raises were distributed for 1996-97 and should occur before initial implementation of the compensation plan. With such an adjustment, some administrative staff members currently at or above the maximum of their salary range would no longer be at the maximum. Conversely, those staff below the minimum of their salary range would receive a larger adjustment in their salary. Once the many issues related to salary ranges are resolved, the issue of maximum salaries must be revisited. There are many ways to deal with this issue, but Administrative Staff Council recommends that any decision to red line staff be used only as a last resort. The option of adding bonuses which would not be added to the salary base needs to be studied. Two other options to consider are to offer an Early Retirement buy out to those administrative staff who are currently at their maximum and to move the salary chart to reflect the most recent salary increase. In addition to the issues of movement of the salary table and salary maximums is that of movement of individuals within the salary grades. What criteria should be used? Longevity of service is certainly a factor that needs to be considered, and, because of the unevenness of performance evaluations across campus, may be the only factor that can be used for current employees. As the process for performance assessment is developed and implemented, the quality of an individual's performance also needs to be taken into consideration.

Again, we appreciate your interest in discussing the Administrative Staff Compensation Plan with us. There are still many unresolved issues, and those discussed on July 22 need to be resolved before the end of September. As your discussions continue, I look forward to being updated so we can keep our constituents informed of developments that will affect us all.



Bowling Green State University

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August 7, 1996

MEMORANDUM

AUG 8 1996

TO: Lester Barber
Bryan Benner
✓ J. Christopher Dalton
Nancy Footer
Peter Hutchinson
John Moore
Edward Whipple

VICE - PRESIDENT
PLANNING AND BUDGETING

FROM: Charles R. Middleton *CRM*
Vice President

RE: Administrative Staff

I have read Joan Morgan's memo after our July 22 meeting with the Executive Committee of Administrative Staff Council with great interest. Through the rest of the Mercer process I think that we need to look at least at the following considerations.

- 1) The salary scales should be adjusted to reflect the current year's (1996-97) anticipated salary ranges. My understanding after our meeting with Chuck Schanie is that we will get these data soon.
- 2) We need to think in terms of career development opportunities as a way to address the issue of long term employees running up against range maximums. In short, we ought to be looking at how people who have been in rank a long time move along to other ranks and other opportunities at the University.
- 3) Annual evaluations of administrative staff ought not to be an option. They should be required. We need to develop a form very quickly so that we can see to it that the evaluation itself is designed to address such matters as career development, job performance, etc.

Furthermore, supervisors who are themselves administrative staff should be held accountable for conducting these evaluations. These evaluations, in my judgment, should be reviewed by the supervisors of the supervisors. They should be used as part of the annual evaluation of supervisory personnel with regard to their effectiveness in their positions.

Page 2

When supervisors are faculty members, the Deans and I will develop a process whereby faculty administrators can be held accountable for conducting these reviews.

At our next meeting on Mercer, when we have a full attendance, I propose that we discuss these issues and devise a strategy for implementing those that we all agree are important.

skg

xc: President Ribeau
Joan C. Morgan, Chair, Administrative Staff Council
Deans' Council

Recommended Administrative Staff Council
1997-98 Goals

To Implement the Administrative Staff Compensation (Mercer) Plan

- establish and follow a specified time frame for implementation
- resolve any positions that were not part of the original process
- reach closure on any appeals not resolved
- develop a mechanism for placement and progression through a grade/range (including movement to the midpoint in a timely manner)
- review the grievance process, because there is none currently
- obtain a copy of a listing of all administrative staff and their rankings as well as those who are exempt
- hold a Mercer Summit to update everyone on the current status of Mercer implementation
- resolve the "perceived" lack of hiring procedures
- review internal promotion procedures as related to the Administrative Staff Compensation (Mercer) Plan
- re-emphasize succession planning
- reorganization vs. promotion

To Raise the ASC Student Scholarship Fund by At Least \$10,000

- Former Chairs, Executive Committee, Council, Entire Staff
- Golf Outing (are there too many?)
- Work Day at Cedar Point
- Paid Time Off
- Matching dollars coming from the University Advancement area
- Establish and advertise a long-range goal
- Auction "services" that administrative staff could provide

To Implement the Performance-Based Merit System and Performance Appraisal Process

- Qualitative vs. Quantitative (Firelands approach)
- Monitoring of supervisors performance
- Are merit/appraisal linked? (i.e. clarification of performance and merit)
- Consistent use of the Performance Appraisal Form (PAF) throughout the total group



Bowling Green State University

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TO: All Administrative Staff

FROM: Rebecca C. Ferguson, Assistant Provost
Human Resources *Rebecca C. Ferguson*

DATE: April 19, 2000

RE: Compensation Plan 2000 and Beyond

In June of 1999, the Board of Trustees approved an allocation of funds to help address market adjustments for administrative staff members whose salaries were not appropriately competitive as part of a long-range comprehensive compensation plan to enhance the competitiveness of faculty and staff salaries here at BGSU. In order to fulfill the Board's compensation directive, President Ribeau charged a small group with two goals: to develop a plan to distribute the funds for market adjustments for 1999/2000 and to propose a compensation plan for the next several years.

The group's work is now largely completed and has received President Ribeau's endorsement. For 1999/2000, employees with nine or more years of experience in their current position will receive salary adjustments taking them to the mid-point of their salary range. These adjustments will be retro active to July 1, 1999.

Now that we are distributing market adjustments for the 1999/2000 fiscal year, I want to provide you with information about how the adjustments have been determined as well as the history of recent changes in administrative staff compensation to allow you to view this information in perspective.

Administrative Compensation Plan History

Beginning in 1994, William M. Mercer, Inc. and BGSU reviewed benchmarked administrative staff positions. BGSU then placed all administrative staff positions in a market driven pay system with pay grades and salary ranges that included a minimum, midpoint and maximum for each pay grade. This was the first step in what has now become the Administrative Staff Compensation Plan.

The salary portion of the review was implemented on January 1, 1996. Administrative staff positions identified below the minimum of the salary range within the pay grades were adjusted to the minimum.

In the fall of 1997, the Office of Human Resources began working with the Personnel Welfare Committee (PWC) of the Administrative Staff Council (ASC) to review concerns regarding salary issues. These discussions focused on issues raised by administrative staff who had been at BGSU prior to the implementation of the Administrative Staff Compensation Plan. PWC requested that the Office of Human Resources concentrate on all employees whose salaries fell below the mid-point of their salary range. PWC's approach concluded that all employees who had nine or more years of meritorious experience in their current position should be at the mid-point of their salary range.

During the 1998/1999 academic year, President Ribeau asked a working group of administrative staff to further review these issues and develop options for his consideration. Among the group's recommendations to President Ribeau was the proposal earlier put forward by PWC. PWC's work is the foundation upon which this year's market adjustments are based.

In June of 1999, the Board of Trustees set aside funds to address market concerns during the 1999/2000 academic year. For the 1999/2000 academic year they also approved a merit salary increase of 3% for all administrative staff and a market adjustment of \$662, prorated on an annual salary basis.

Compensation 2000: Year One (1999/2000)

Goal: To bring all employees with nine (9) or more years of experience, as of December 31, 1999, in their current position up to the mid-point of their salary range.

Eligible employees will receive their adjustments, which are retroactive to July 1, 1999, in their April paycheck. Individual letters will be sent to the eligible employees indicating the adjustment.

Compensation 2000: Year Two (2000/2001)

Goal: To bring all employees with five or more years of experience in their current position, as of December 31, 1999, closer to the mid-point of their salary range.

Compensation 2000: Year 3 (2001/2002)

Goal: To review administrative salaries that have not been reviewed to date, to insure the salaries are appropriately competitive.

Reviews will be done by using appropriate market benchmarks such as the College and University Personnel Association (CUPA) Administrative Compensation Survey and the CUPA Mid-Level Administrative Compensation Survey.

Conclusion

All administrative staff members hired into an administrative staff position before January 1, 1991, having nine or more years of experience, and falling below the midpoint of the salary range will be receiving a letter with additional information.

If employees disagree with the determination of years of experience in their current position they will have the opportunity to appeal. The Office of Human Resources, collaborating with members of Administrative Staff Council, has established an appeals process. For the employees being notified in April, appeal packets can be picked up at the Office of Human Resources beginning April 24, 2000. Appeals must be returned to the Office of Human Resources by May 15, 2000.

We have worked hard to respect the goals of the President, his working groups and the original recommendations of PWC. Any questions regarding the distribution should be directed to me at 372-2259 or fergusb@bgnet.bgsu.edu.

ASC Compensation Goals—2001/2002

Talking Points with President's Compensation Committee—10/22/01

1. Equitable, "regularized" compensation for extra-duty administrative teaching

- a. Issue statement: Administrative staff who teach BGSU classes outside their assigned position responsibilities often receive no compensation or, if they do, usually receive "overload" compensation well below the rate paid to adjunct instructors with similar or lesser credentials. Four-plus years of research on this topic have revealed 40-50 admin staff teaching each term (some *within* contracted duty) and no historical rationales for the administrative teaching overload procedure.
- b. Perceived effects:
 - i. Improved morale
 - ii. Contracting for all instructors of record protects the University
 - iii. Evens the playing field for adjuncts and admin staff alike
 - iv. Decreases exploitation of admin staff
 - v. Minimal economic impact: While increased teaching compensation might result, departments should already have budgeted adjunct salaries for unstaffed sections
- c. Discussion:

2. Annually indexed administrative staff salary range adjustments

- a. Issue statement: Based on Mercer Co.'s recommendation, the original (1995/96) aggregate placement for BGSU administrative staff salary ranges was 50th percentile of relevant market. In July 2001, Mercer judged our admin salary range mean as 43rd percentile of market. ASC's primary compensation goal for 2001-2002 is annual range adjustment indexed to keep our ranges at or near the 50th percentile of market.
- b. Perceived effects:
 - i. Keep appropriate market-oriented compensation benchmark within view
 - ii. Allow realistic proportional measurement of salaries relative to market (e.g., employees holding steady within pay range are holding steady relative to market if the range is holding steady)
 - iii. If individual annual merit equals or is lesser than annual indexed range movement, range maximum will not constrain (except for employees already above maximum)
 - iv. If employee salary is below first quartile of range and annual merit is significantly lower than indexed range movement, adjustment to minimum may be required. In years of weak merit, most individual salaries would lose range penetration
- c. Discussion:

3. Hire-in-position salaries not below 25th percentile without approval of a hiring team consisting of hiring officer, H.R. representative, and area V.P.

- a. Issue statement: Since 1995/96, even with relatively strong state economies and institutional economic growth, only one-time market adjustments and upward position reevaluations have created significant salary range penetration for individual employees. ASC's goal for individual salaries is at least the 50th percentile of realistically market-based range for administrative staff with consistently meritorious performance, "full competency," and significant years in position. Hire-in salary at or above the 25th percentile of range is essential for employees to reach range midpoint within 10-15 years, barring extra-procedural adjustment.
- b. Perceived effects:
 - i. Improved administrative recruitment
 - ii. Improved administrative retention
 - iii. Higher productivity and performance quality
 - iv. Lower replacement-associated cost and use of employee resources for hiring-related activities
 - v. Along with annually indexed movement of ranges, some necessity of inversion/compression raises for continuing employees (current employees could not be allowed to slip below 25th percentile)
 - vi. If the conditions of item v were true, an increased percentage of our admin staff salaries probably would be clustered around the middle of the pay ranges (ideal)
- c. Discussion:

4. Targeted growth in real, spendable income for administrative staff

- a. Issue statement: Since 1995/96, annual merit available to BGSU's administrative staff has averaged approximately 3.1% while annual increases in consumer price index have averaged 3.4%. Even in periods of relative financial plenty, one-time across-the-board or individual market adjustments appear necessary just to maintain financial status quo for our administrative staff. To avoid financial slippage contradictory to the employee's professional growth and value to the institution, BGSU should place a high priority on annual merit thresholds greater than the increase in regionally adjusted c.p.i.
- b. Perceived effects:
 - i. After aggregate ranges have been readjusted to the 50th percentile of relevant market, merit even .1% greater than regionally adjusted c.p.i. movement for the year will assure some degree of real salary penetration of realistic salary ranges
 - ii. Even a 10% increase in annual merit pool (perhaps 1/2 of a percent) will necessitate further sacrifice—by institution and individual employees
- c. Discussion:

5. Market adjustment pool

- a. Issue statement: We must establish clearly articulated guidelines for possible "market" salary adjustments. *If* we accept a 50th percentile of market as an appropriate salary target for meritorious admin staff and accept 25th percentile of range as an appropriate lower threshold for hiring, the minimum adjustment of merit pools necessary to permit growth in real spendable income still would fall short of growing salaries from 25th to 50th percentile of range within 10 years. *If*, additionally, we allow some employees and some supervisors to negotiate accelerated salary growth, equity demands that clear articulation of rational guidelines for such market adjustments.
- b. Perceived effects:
 - i. The articulated possibility of market-based salary adjustment may aid in retention of some of our best administrative employees, particularly those whose expertise is not amenable (or less amenable) to lateral movement within BGSU
 - ii. Salary increases and open pursuit of equal opportunity increase morale
 - iii. Ideally, budget would be balanced by improved retention and productivity
- c. Discussion:

6. Non-compensation conciliation revision

- a. Statement of issue: A revision draft is attached for the administrative staff non-compensation conciliation process. The previous policy statement contained flaws that, when the conciliation process was tested this past year, led to employee dissatisfaction. In addition to minor editing revisions, we are proposing significant changes: (1) streamlined process timeline, with full communication at every step; (2) the possibility of an advocate to accompany the employee during conciliation; (3) movement of the area V.P. to the second process stage, conciliation appeal.
- b. Perceived effects:
 - i. Employee is fully apprised of judgments/responses and is not kept in suspense for months—debilitating to health and productivity—for a decision.
 - ii. A colleague or peer in attendance may reduce employees' anxiety and increase their success in objectively, cogently presenting their perspectives
 - iii. Moving the area V.P. from the first conciliation meeting to the appeal stage allows the employee a fresh and presumably unbiased appeal audience
- c. Discussion:

Bowling Green State University

Administrative Staff Council

John M. Clark, Chair



April 4, 2002

To: Dr. Sidney Ribeau

XC: Faculty Senate Budget Committee
Classified Staff Council

From: Administrative Staff Council

Re: Administrative Staff Salary Recommendation 2002 – 2003

Bowling Green State University is experiencing an all time high in student enrollment. Because of the hard work and dedication of BGSU's faculty, classified staff members, and the administrative staff members, Bowling Green State University is on track to becoming the "Premier Learning Community" in Ohio and one of the best in the nation.

To begin movement toward compensation commensurate with the quality of work expected, Administrative Staff Council is recommending an administrative staff salary increase for 2002-2003 of 5%, plus a 1.5% super merit pool. After many years of real-income loss for the administrative staff aggregate at BGSU, the recommended increases could begin to move all of BGSU administrative staff toward appropriate, market-competitive compensation.

The following items exemplify some of the reasoning behind this recommendation:

- Comparison of BGSU Administrative staff compensation to ten peer institutions in Ohio, as documented in College and University Personnel Association (CUPA) reports, shows a continuing downward spiral in competitiveness. This continued loss of competitiveness within our market or recruiting area has made it difficult for BGSU to attract and retain well-qualified personnel for administrative positions at BGSU. Retention of skilled, experienced administrators has been especially difficult, approximately 73% of administrative staff having served fewer than six years in position.
- Mercer Co. has noted that between July 1996 and July 2001 our administrative salary ranges dropped from an aggregate market midpoint (50th percentile) to 43rd percentile.
- Enrollment at BGSU is at an all time high. Administrative staff has continued to work above and beyond their job duties to give the best possible service to our students. Administrative staff members have also continued to work above and beyond the eight-to-five workday and to volunteer for recruitment programs such as Preview Days, President's Day, and Gear Up.

Administrative Staff Council understands the economic situation of the State of Ohio and of the University. However, if our difficulties continue in retaining our experienced administrative staff and recruiting new employees of quality, BGSU's quest to become the premier learning community in Ohio and one of the best in the nation may be seriously hindered.

ASC Compensation Goals—2001/2002
Talking Points with President's Compensation Committee—10/22/01

1. **Equitable, "regularized" compensation for extra-duty administrative teaching.**
 - a. Issue statement: Administrative staff who teach BGSU classes outside their assigned position responsibilities often receive no compensation or, if they do, usually receive "merit" compensation well below the rate paid to adjunct instructors with similar or lesser credentials. Four-plus years of research on this topic have revealed 40-50 admin staff teaching each term (some within contracted duty) and no historical rationale for the administrative teaching overload procedure.
 - b. Perceived effects:
 - i. Improved morale
 - ii. Contrasting for all instructors of record protect the University
 - iii. Even the playing field for adjuncts and admin staff alike
 - iv. Decreases exploitation of admin staff
 - v. Minimal economic impact: While increased teaching compensation might result, departments should already have budgeted adjunct salaries for unstaffed sections
 - c. Discussion:
2. **Annually indexed administrative staff salary range adjustments**
 - a. Issue statement: Based on Mercer Co.'s recommendation, the original (1995/96) aggregate placement for BGSU administrative staff salary ranges was 50th percentile of relevant market. In July 2001, Mercer judged our administrative salary range mean as 43rd percentile of market. ASC's primary compensation goal for 2001-2002 is annual range adjustment balanced to keep our ranges at or near the 50th percentile of market.
 - b. Perceived effects:
 - i. Keep appropriate market-oriented compensation benchmark within view
 - ii. Allow realistic proportional measurement of salaries relative to market (e.g., employees holding steady within pay range are holding steady relative to market if the range is holding steady)
 - iii. If individual annual merit equals or is lesser than annual indexed range movement, range maximum will not constrain (except for employees already above maximum)
 - iv. If employee salary is below first quartile of range and annual merit is significantly lower than indexed range movement, adjustment to minimum may be required. In years of weak merit, most individual salaries would lose range penetration.
 - c. Discussion:
3. **Hire-in position salaries not below 25th percentile without approval of a hiring team consisting of hiring officer, R.R. representative, and Area V.P.**
 - a. Issue statement: Since 1995/96, even with relatively strong state economies and institutional economic growth, only one-time market adjustments and upward position reevaluations have created significant salary range penetration for individual employees. ASC's goal for individual salaries is at least the 50th percentile of realistically market-based range for administrative staff with consistently meritorious performance, "full competency," and significant years in position. Hire-in salary at or above the 25th percentile of range is essential for employees to reach range midpoint within 10-15 years, barring extra-procedural adjustment.
 - b. Perceived effects:
 - i. Improved administrative recruitment
 - ii. Improved administrative retention
 - iii. Higher productivity and performance quality
 - iv. Lower replacement-associated cost and use of employee resources for hiring-related activities
 - v. Along with annually indexed movement of ranges, some accuracy of inversion/compression raises for continuing employees (current employees could not be allowed to slip below 25th percentile)
 - vi. If the conditions of item v were met, an increased percentage of our admin. staff salaries probably would be clustered around the middle of the pay ranges (ideal)
 - c. Discussion:

4. Targeted growth in real, spendable income for administrative staff

- a. Issue statement: Since 1995/96, annual merit available to BGSU's administrative staff has averaged approximately 3.1% while annual increases in consumer price index have averaged 3.4%. Even in periods of relative financial plenty, one-time across-the-board or individual market adjustments appear necessary just to maintain financial equilibrium for our administrative staff. To avoid financial slippage contradictory to the employee's professional growth and value to the institution, BGSU should place a high priority on annual merit thresholds greater than the increase in regionally adjusted c.p.i.
- b. Perceived effects:
 - i. After aggregate ranges have been readjusted to the 50th percentile of relevant market, merit even .1% greater than regionally adjusted c.p.i. movement for the year will assure some degree of real salary penetration of realistic salary ranges
 - ii. Even a 10% increase in annual merit pool (perhaps $\frac{1}{2}$ of a percent) will approximate further sacrifice—by institution and individual employees
- c. Discussion:

5. Market adjustment pool

- a. Issue statement: We must establish clearly articulated guidelines for possible "market" salary adjustments. If we accept a 50th percentile of market as an appropriate salary target for administrative staff and accept 25th percentile of range as an appropriate lower threshold for hiring, the minimum adjustment of merit pool necessary to permit growth in real spendable income will would fall short of growing salaries from 25th to 50th percentile of range within 10 years. If, additionally, we allow some employees and some supervisors to negotiate accelerated salary growth, equity demands that clear articulation of rational guidelines for such market adjustments.
- b. Perceived effects:
 - i. The articulated possibility of market-based salary adjustment may aid in retention of some of our best administrative employees, particularly those whose expertise is not amenable (or less amenable) to lateral movement within BGSU
 - ii. Salary increases and open pursuit of equal opportunity increase morale
 - iii. Ideally, budget would be balanced by improved retention and productivity
- c. Discussion:

6. Non-compensation conflict resolution

- a. Statement of issue: A revision draft is attached for the administrative staff non-compensation conflict resolution process. The previous policy statement contained flaws that, when the conflict resolution process was tested this past year, led to employee dissatisfaction. In addition to minor editing revisions, we are proposing significant changes: (1) streamlined process timeline, with full communication at every step; (2) the possibility of an advocate to accompany the employee during conflict resolution; (3) movement of the area V.P. to the second process stage, conflict resolution appeal.
- b. Perceived effects:
 - i. Employee is fully apprised of judgments/responses and is not kept in suspense for months—debilitating to health and productivity—for a decision.
 - ii. A colleague or peer in attendance may reduce employees' anxiety and increase their success in objectively, cogently presenting their perspectives
 - iii. Moving the area V.P. from the first conflict resolution meeting to the appeal stage allows the employee a fresh and presumably unbiased appeal audience.
- c. Discussion:

Minutes of Administrative Staff Council

May 2, 2002

Call to order: Chair John Clark called the meeting to order at 1:30.

Members Present: Linda Balchun, Annette Bragdon, Nora Cassidy, John Clark, Wayne Colvin, Tim Coulter, Jim Duchik, Carl DeBauer, Sally Dreier, Laurel Enrich, Deborah Flahiz, Brady Gaschins, Kay Gudenhue, Tony Howard, Sally Johnson, sue Lin, Thad Long, Sandra Miesner, Jane Myers, Pamela Phillips, Diane Smith, Tom Scavo, Phyllis Short, Robin Veltch, Barbara Waddell, Mary Beth Zachary, Robert Zhang

Members who sent substitutes: None

Absent: Ann Benz, Sandra DiCarlo, Mike Fitzpatrick, David Garcia, Keith Pagan.

Corrections to Minutes: None

Chair Report: ASC Executive Committee recently queried several council members about their desire to remain on council for next year, in light of three or more absences from council sessions (without substitute) in this council year. One representative, whose term ended this semester, has resigned from ASC. The remainder wish to remain on council, however, and Executive Committee voted to grant this privilege. Past Chair Zachary has suggested that ASC create an on-call substitute pool from the administrative staff constituency, ready to step in when necessary for any council member who must miss a meeting.

Executive Committee also has made representative appointments to two ad hoc committees quickly formed by Executive Vice President Dobb. The first is an all-employee-groups committee to meet this summer and review/revisi the Severe Weather Policy; our appointed representatives are Mary Beth Zachary and Josh Kaplan. The second group will meet throughout 2002-2003 as a task force to help integrate technology across the university curriculum; our appointed representative is John Clark.

Our presentation to the Administrative Compensation Working Group was well received. Last-breaking statistics show that administrative merit awarded over the past five years slightly outpaced national inflation. At the same time, however, our aggregate pay ranges lost 7 percentile points to our competitive market. We have recommended a 4.2% increase in all pay ranges, as a catch-up. We also have recommended that Meritor come in every three years to recalibrate our pay ranges.

Additional stats:

Our aggregate "range penetration" (average for all) as of March 2002 was 49th percentile (remember that our ranges are out of balance with the market, however)

In grades 18-22, 55 staff average 51st percentile of range, approx. 9 staff over maximum

In grades 16 & 17, 134 staff average 69th percentile of range, approx. 47 staff below midpoint

In grades 14 & 15, 196 staff average 35th percentile of range, approx. 114 staff below midpoint

In grades 9-13, 147 staff average 19th percentile of range, approx. 103 staff below midpoint

We also recommended to the Compensation Group a 5% base merit increase for 2002-03 and a 1.5% super merit pool.

All matters of compensation and policy change will be delayed until an extra, June 19 Board meeting

Depending upon further discussion and possible action in Faculty Senate, Assistant Vice President Ferguson notes that a revised Policy on Violence might go to the Board for approval on June 19.

Ferguson also notes that she will try to gain administration approval for the revised non-compensation cancellation document and will try to get it to the June 19 Board session.

Finally, Ferguson will try to bring FMLA revisions to the Board in June; the plan at this time is to temporarily back off from revision of all leaves and continue this work next fall.

President's Panel, April 18:

President Ribeiro led significant discussion of the Severe Weather Policy and its application on 3/25/02. As points of interest, the President asserted that campus was not closed on 3/25, so classified employees who worked evening shifts cannot (by law) be paid overtime for that evening. Also, the President related, "offices" (as applied in this policy) might be ambiguous, meaning business offices to some and all employees to others. All parties agreed to a committee review of the policy, with two consultant-appointed representatives for each employee group.

ASC representatives to the panel raised discussion of central administration support for electronic communication (suggestion: a more centralized effort and articulated philosophy). Based on a prior suggestion from H.R.'s Ferguson, we also raised for discussion the idea of a central policy manual (maintained by H.R.) for those employee policies that are common across constituencies. Panel representatives and administration spoke favorably about both issues.

Bowling Green State University

Administrative Staff Council

John M. Clark, Chair



April 4, 2002

To: Dr. Sidney Ribeau

XC: Faculty Senate Budget Committee
Classified Staff Council

From: Administrative Staff Council

Re: Administrative Staff Salary Recommendation 2002 - 2003

Bowling Green State University is experiencing an all time high in student enrollment. Because of the hard work and dedication of BGSU's faculty, classified staff members, and the administrative staff members, Bowling Green State University is on track to becoming the "Premier Learning Community" in Ohio and one of the best in the nation.

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The following items exemplify some of the reasoning behind this recommendation:

- Comparison of BGSU Administrative staff compensation to ten peer institutions in Ohio, as documented in College and University Personnel Association (CUPA) reports, shows a continuing downward spiral in competitiveness. This continued loss of competitiveness within our market or recruiting area has made it difficult for BGSU to attract and retain well-qualified personnel for administrative positions at BGSU. Retention of skilled, experienced administrators has been especially difficult, approximately 73% of administrative staff having served fewer than six years in position.
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Yowling Green State University

Administrative Staff Council

Chair
Office of Registration & Records
(857) 372-7993



ASC Chair's Report—November 1, 2001

A number of news and discussion items have arisen from meetings during the past month of ASC leadership with University administration and/or other constituency leaders.

Board meeting, October 4th: There were no surprises at this Board meeting. The trustees adopted the health care proposals without significant discussion or argument. In the financial subcommittee session, Bob Waddle reported a projected completion date for the Union renovation of December 28th. Finance subcommittee chair Valerie Newell noted that the increase in student general fee that will result from the Union renovation (\$50) precisely matches the target established five years ago, when planning for the renovation began.

Compensation: Spirited discussion of compensation issues took place in Executive Committee on September 25th. The committee concluded that our highest priorities need to be (1) induced salary range movement, (2) means for range penetration adjustments, and (3) long-term planning for increases in total spendable income. At the meeting with President's Compensation Committee on October 22nd, Clark and Smith presented these items as requests, along with another request for action on the Ruckling compensation proposal and further explanation of our proposed revision of non-compensation conciliation. Developments are noted in the following list (also see separate presentation handout):

- * Teaching compensation—The chair of the PCC, Executive V.P. Dobb, noted that the best approach to equitable teaching compensation for administrative staff might lie in adjustment to the rates for all "non-teaching" teaching; the committee agreed, and this item received further discussion in President's Panel on Oct. 23rd. Although there is significant high-level support for this solution, present economic circumstances might delay its adoption.
- * Annually induced salary range adjustments—PCC are in favor of it is proposed and have promised to move it toward approval. As the presentation handout indicates, two likely by-products of annual range induction are no "top" impingement and, in few more years, possible *percentile drops* (not dollar drops) of individual salaries within range.
- * Hire-in position salaries not below the 1st percentile without approval—PCC and ASC leadership agreed on this proposal in principle, including a provision that some positions (expected to be short-term) might be exempt. PCC also noted, however, that some "education" of University leaders might be needed. Dobb and Ferguson agreed to work toward this goal.
- * Annual merit increases for meritorious admin staff greater than the regionally adjusted increase in C.P.I.—Again, the PCC agreed to this proposal in principle, though present circumstances might delay implementation.
- * Maintenance and augmentation of a merit adjustment pool, with clear articulation of access procedures—In both the PCC meeting and the President's Panel, University leaders agreed that policy articulation for merit-based salary adjustments should be more clearly organized and comprehensively articulated.
- * Non-compensation conciliation—Three significant revisions appear in the latest draft prepared by PWC and HR. The first is a speeding-up of timeline from 30 to 14 days in each step; the second is removal of the area V.P. from step 1 so that she may provide an objective "appeal" hearing in step 2. University administration has shown the most concern for the third revision, whereas for an advocate to accompany the conciliation claimant, but administration approval of these revisions looks likely.

Merit discussions: Faculty Senate continues to discuss its compensation committee proposal to cap "regular merit" at 2% and distribute any remaining funds via super-merit. Some contention exists among Faculty Senators regarding this proposal, but President Ribera has assured us that there is no reason each employee constituency cannot have its own procedures for merit distribution, as long as procedures comply with the Board requirement of a performance-based merit system.

Health care insurance plan. Open enrollment and enrollment of a spouse are scheduled through the end of November. All University employees are required to complete and submit the enrollment form. Some discussion has taken place regarding the wording of the disclosure statement near the bottom of this form. Board trustees and University leaders shared a concern that, with health care costs rising everywhere, the better our health care providers look, the more spouses of University employees might migrate to BGSU as their primary health care provider. Human Resources rejects that the group with the greatest claims increases within the past few years (in number of claims and in dollars) has been employee spouses.

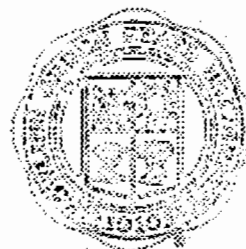
Miscellaneous updates

- A data table prepared for us by Donna Wilfong, ILR, shows 512 administrative staff currently at BGSU, compared to approximately 539 a year ago. Percentages by years in position and by position within salary ranges remain virtually unchanged from a year ago—73% with fewer than 5 years in position, 9% with 5-10 years in position, and 18% with 11+ years in position; 54% below salary range midpoint, 26% within the 3rd quartile, and 20% in the top quartile to above range maximum. Wilfong will further research the 26% of administrative employees between midpoint and 25th percentile and share her findings with us, in hopes that we might determine for which positions a starting salary in the first quartile might be appropriate.
- Classified Staff Council has asked permission for University employees to do walking inside the Byrlier Complex during lunchtime. The President is in support of this proposal, and possibilities for staff-oriented exercise and health workshops in the same facility also will be explored.
- Our salary ranges were raised 3.55% this past summer. Prior to this range movement, Mercer judged our salary range aggregate as the 47th percentile of our administrative staff market. The range adjustment should have resulted in some growth relative to market, because our 3% increase for administrative admin staff was the second highest among the 13 state universities in Ohio.
- The President and Provost report a lot of discontent and discussion among the leaders of Ohio's universities concerning proposals to do away with state-funded "challenge" programs. BGSU has done well, Provost Perkins reports, in the success challenge, relatively well in the 4-year-graduation challenge, and poorly in the research challenge and other challenges. "Don't be surprised," Perkins noted, "if these challenges go away." As the Provost also predicts, elimination of the challenge subsidy programs probably would result in some return of those monies to general subsidy. However, should this occur, he does not expect all of the challenge money to make its way back to Ohio's institutions of higher education, and any effort to keep a program alive that was founded on challenge grant dollars would be an additional drain on institutions.
- Total enrollment growth at BGSU this year has been reported as 2.6%.

Bowling Green State University

Administrative Staff Council

215 East Hall
Bowling Green, OH 43403
(419) 373-7225



June 4, 2001

To: Dr. Sidney Ribzau

CC: Faculty Senate Budget Committee
President's Compensation Working Group

From: Administrative Staff Council

Re: Administrative Staff Salary Recommendation 2001 - 2002

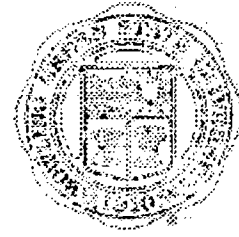
Given the highly volatile nature of the budget situation in Ohio at this time while also acknowledging the financial constraints under which we are all working, Administrative Staff Council finds it difficult to recommend as appropriate a specific percentage increase in salary for the next contract year.

ASC has charted competitively, for more than a decade, Bowling Green State University (BGSU) administrative staff compensation against ten peer institutions in Ohio as documented in College and University Personnel Association (CUPA) reports. A thorough analysis offered in last year's salary recommendation showed that on the average our CUPA-defined administrative positions had lost ground—in both dollars and in statewide ranking—against all ten of the peer institutions that define our competitive recruitment market. Recent data analysis suggests a continuation of that downward competitive spiral. To reach even the fifth place or mid-range of our peer institutions in Ohio, a competitive placement we enjoyed in the mid-90s, clearly would require a double-digit percentage of salary increase. In the current fiscal situation, we realize that such a request would seem selfish, even ludicrous.

Given, however, that administrative staff, classified staff, and non-instructional faculty have borne and will bear the burden of the selective hiring freeze, Administrative Staff Council recommends that whatever raise is given to the employees of BGSU for the 2001-2002 contract year, however small is given in a fair and equitable manner—i.e., that each employee group be given the same percentage of salary increase. Differential increases among employee constituent groups, especially in a time

Bowling Green State University
Administrative Staff Council

Ernest Bookman, not defined, Chair
Office of Registration & Records
(419) 372-1992



ASC Chair's Report—March 7, 2002

Points of Interest from Board of Trustees meeting 2/26/02:

- Chris Gallon: The approved 7% tuition increase for summer 2002 would have had to be 8% higher to fully offset losses in state share of instruction in this calendar year. Costs of instruction are expected to increase an additional 8.7% for 2002-03.
- Chris Gallon: Ohio's twenty-year slide from per capita income 10% above the national average to its current per capita status of 5-10% below national average parallels its slide in per capita percentage of baccalaureate degrees.
- A study of mechanical/electrical systems updating for Jerome Library estimates costs at \$15-20 million.
- In February, we were just beginning to be impacted by the \$5.5 million cut in state share of instruction. \$3 million in cuts "volunteered" by divisions has been placed in budget reserve; another \$2.5 million must be earmarked before June 30.
- BGSD did well in Success Challenge income this year, receiving approximately \$3.6 million or a \$1 million increase over last year.
- ITS expenditures have risen significantly, due to firm/firmware timely replacement of desktop systems.

Other news:

- Administrative Staff Advisory Team: Executive Committee has accepted 10 replacements and several alternates selected by the Chair and Chair-elect in collaboration with Human Resources. The need for 10 replacements on the 15-member team in one year and a late start in replacement planning—coupled with the need for significant training of new team members—didn't allow self-nomination for positions in this cycle. Executive Committee would like next year's timeline to allow comprehensive advertisement of team openings.
- Teaching compensation revision has been approved, effective 2000-2003.
- Marketing & Communication has launched daily BGSD News service.
- Comprehensive release time for April 16 legislative visit has been denied.
- Starting salaries are generally stronger, but significant numbers of administrative staff, especially in grades 13-16, linger below 25th percentile after several years.
- We have heard central administration support for annual range indexing and are awaiting at least 3 different models (based on percentage of increases relative to C.P.I.) from Human Resources.
- Faculty Senate has voted down the proposal for full voting members from ASC/ASC.

Respectfully submitted,

John M. Clark

**2002-03
Admin Staff
Compensation**

Presented April 10, 2002 by:
Administrative Staff Council

Where are we now?
Successes and other results

- Life in the Fast Lane
- Band-aids & Hospitalis
- Yardsale & Cutting the Pie

LIFE IN THE FAST LANE
(High % in "growth" years)

| | |
|-----------------------------|-----------------------------|
| • December 2000 | • December 2001 |
| — 73% 0-5 years in position | — 73% 0-5 years in position |
| — 10% 6-9 years | — 9.5% 6-9 years |
| — 17% 10+ years | — 17.5% 10+ years |

EMERGENCY & HOSPITALS

Band-aid didn't hold

- One-time emergency at 1998 & 2000 when needed temporary relief
- "We've changed our mind"
- We now have a long-term solution
- No emergency relief action toward market position in "growth" years (2-4)
- We have moved the ranges, but

Hospital's Long-term

Comp. Infrastructure

- Adapting the currently qualified, top at 75% performance and above
- With competitive infrastructure, plans for comprehensive restructuring
- Focus on better answer growth more important
- Make & Keep the Ranges Market Competitive

Yardsticks & Cutting the Pie

May 18 Michael Bloomberg says there's a good

legislation and the 2nd step, why

What happened to my yardstick?

- ✓ 1996 March BLSU set within ranges of 50% market percentile
- ✓ December 1995-December 2001: consumer price index 1998: 10.2%
- ✓ December 1995-December 2001: BLSU raises summative ranges 12.0%
- ✓ 1995-2000, 2000-2010: BLSU loans growth to all Ohio peers in mean of CUPA comparatives
- ✓ Our appropriate ranges far to 42% percentile
- ✓ The Good News Alert is Generally Outlining National Initiatives (goods and services)

And How Do We Solve It?

- Grades 10-12: 22 people average 21st percentile with 33% below midpoint (16% above range maximum)
 - Grades 16 & 17: 134 people average 63th percentile with 33% below midpoint
 - Grades 14 & 15: 102 people average 32nd percentile with 66% below midpoint
 - Grades 9-13: 147 people average 35th percentile with 72% below midpoint
- The Good News: Our aggregate "range maximum" this year is 67th percentile, approximately our school benchmark
- The Not-so-good News: 19th percentile of a 19th percentile range is roughly 15th percentile relative to market

Our Recommendations

1. Back to 36 inches.
2. Minor pie-cutting adjustment.

Goals for the near and (slightly) more distant future

- **Back to 36 inches (and keep it there):**
 - Make a significant adjustment for all column ranges, 4.4% would suggest all with age increases, in total
 - Almost entirely taken by capital costs, 4.3%
 - Stay in Market every third year to offset our misalignments relative to our market
- **Small adjustments in the slice:**
 - Look at categories for upgraders to lower-end categories (e.g. from 36" to 30" or 30" to 24") in an upgrader's row suggests 3-4% lower-end increases
 - Use Market Index range (except for 24" to 30" and 30" to 36") as a benchmark in the range
 - Pay attention to other below-market categories, especially after 3 years in column

Bowling Green State University

Administrative Staff Council

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Notes from Mercer Meeting: 5/23/01

On May 23, 2001, ASC representatives John Clark, Laura Emch, and Mary Beth Zachary met with Mercer Inc. consultant Scott Cook, H.R. representatives Becca Ferguson and Donna Wittwer, and Executive V.P. Linda Dobb to discuss Mercer's follow-up recommendations on administrative staff compensation to the President's Compensation Working Group. The following are notes from that meeting, compiled by John M. Clark—2001-2002 ASC Chair.

1. Mercer's History with BGSU: In 1995, Mercer came to BGSU to assess the market competitiveness of our administrative/professional staff compensation. In particular, their focuses were 1) base pay, 2) pay ranges, and 3) review of IT positions.
2. In 2001, Mercer conducted a follow-up study based on 57 "benchmark" administrative positions. These positions were chosen as benchmarks by the vice presidents based on their representativeness of the entire administrative employee group.
3. In this year's Mercer study, special emphasis again was given to IT positions.
4. Mercer compiled salary data from 24 surveys, reflective of salary medians, representative of our geographic recruiting area (for each benchmark position), and *adjusted to July 1, 2001* (i.e., the data were "aged" to be representative of the market on the beginning of our next fiscal year).
5. Data matching was done based on job content, not type of position. (This reinforces Mercer's consistent focus on skill sets rather than department or specific position.)
6. Elements of Mercer's Competitive Assessment
 - Actual salaries and pay ranges compared to [recruiting area] market
 - Variance between ratios not typical
 - ◊ Actual salary ratios may vary due to differences in employee credentials
 - ◊ Midpoint ratios may vary due to valuation differences placed on the position by different institutions (a one-grade difference from "market" is OK, but not three or four grades difference in a position)
 - ◊ IT is judged separately
 - Ratios calculated by comparing. . .
 - ◊ actual salaries to market (average of all incumbents in a position)
 - ◊ range midpoints to market

7. Actual Salary Competitiveness:

- In 1995, all administrative/professional jobs at BGSU were at 99% of market (market being the 50th percentile for each position, this means our average was the 49.5 percentile)
- In 2001, all administrative jobs at BGSU, as a group, are at 95% of market (or 47.5 percentile)
- Our IT are presently worst in relation to market—88% or 44th percentile
- *Distribution* in relation to pay range and market is also crucial; the above percentiles are averages, and individual persons or positions can be higher or lower than BGSU average

8. Pay Structure Competitiveness:

- The administrative/professional ranges, as an aggregate, now are at 89% (44.5 percentile) of market—these ranges were set in 1995 exactly at 100%, or the 50th percentile, of market
- Our IT pay ranges now are at 83% of market, or the 41.5 percentile
- “Outliers” could be inappropriately graded, or the market valued the job differently than the institution (e.g., pharmacists, physicians, IT)

9. Salary Range Placement:

- Ranges set at 100% of market (50th percentile) in 1995
- In January, 1996, implementation of the BGSU Mercer Plan raised administrative employees only to minimum of range
- This implementation also created some salary compression—brought some newer employees close to the salaries of longer-term employees in the same unit and/or similar position
- Midpoint (50th percentile of pay range) is Mercer’s recommended market target for admin.
- Mercer also notes that the market “norm” for administrative/professional positions is for employees to reach midpoint of pay range within 4 to 7 years in position

10. A Mercer Model for Advancement through Pay Range:

- Mercer posits that administrative employees in the first quartile, minimum to 25th percentile, should be in the “learning and growing” stage for the position (and, conversely, that employees beyond the learning and growing stage should be higher in the pay range)
- Mercer considers administrative employees in the second pay range quartile, 26th percentile to midpoint, “seasoned and competent” for their positions
- Mercer considers administrative employees in the third pay range quartile, 51st to 75th percentiles, “outstanding and sustained performers” for their positions
- Mercer considers administrative employees in the top pay range quartile, 76th percentile to range maximum, inhabitants of “premium territory”—employees whose base salary at the beginning of the contract year puts them among the highest-paid in the market for their positions
- Mercer notes that “best practice” of institutions across the U.S. now considers it appropriate for 15-20% of the total workforce to be in the “outstanding sustained performance” and “premium” salary levels—and that these base salaries relative to market for the position be established by performance, not longevity alone

- Finally, Mercer notes that best compensation practices or plans across the country include a pay and performance-reward package to accelerate movement of good performers in years 0-7 (within position) to range midpoint

11. As consultant Scott Cook explained, the portion of “best compensation practice” least understood is that institutional expectations are much higher for the midpoint-and-up, “premium” base pay area than for the minimum-to-midpoint (0-50th percentile) area. All of an employee’s experience, knowledge, and superior performance over the years plus an excellent performance in the past equal a premium salary that might be increased for the upcoming year.

12. Range “Penetration”:

- Average of all BGSU administrative/professional employees is 57th percentile of range
- Average years in position for all BGSU administrative employees is 6 years
- Increased penetration of range by some administrative staff could be offset by decreased penetration by others

13. Mercer Recommendations:

- Adjust pay ranges to align with market median (required adjustment = 8-9%); one option, if range adjustment of this magnitude is unmanageable, would be smaller pay-range increases (smaller than 8-9%) over the next one to three years—a phasing-in approach
- Re-examine internal pay-range placements of positions in the Development area
- Establish a separate pay-range structure for IT positions
- Re-evaluate significant outliers with respect to midpoint ratios (positions significantly out of market norm relative to the position pay range)
- Review current employee salaries, after the structural or pay-range adjustment, to re-establish internal and external pay equity

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BGSU

COMPENSATION AND MERCER - Administrative Staff at BGSU

May 1993

ASC Exec met with a Mercer rep re: proposed consulting project to study administrative staff positions, titles and compensation

Exec asked Ad Council – after individuals have been identified who need market or salary equity adjustments, if it is not feasible to make the adjustments now, phase them in over the next three years. The monies used for these adjustments should be from a pool separate from salary funds.

Sept 1995

Mercer Study

Personnel will distribute the initial results of the Mercer Study to the administrative staff on September 25th. A representative from Mercer will make a presentation the week of the 25th to all administrative staff reviewing the procedures used in the study. ASC will be working to get as much information as possible to our constituents so that they have a clear understanding of how scoring was done and how to approach the appeals process. The ASC members of the Mercer Committee have lobbied to make the point that we do not support salary caps. A separate proposal will go to the Vice Presidents that addresses administrative staff policies and procedures affected by the Mercer Study. Administrative Staff has had input into this document through our representatives on the Committee.

Market Adjustments

Last year thirty-four administrative staff members applied for market adjustments under the procedures currently in place for administrative staff. Although the Trustees had identified money in the budget for market adjustments, staff members were informed that market decision were put on hold until after the Mercer Study was implemented. ASC will try to get information from the Vice Presidents regarding how market adjustments will be handled for administrative staff caught in this situation.

Oct 1995

Chair's Report

Mercer Study

Bryan Benner stated that he has been inundated with questions regarding the Mercer Study. In discussion at its last meeting, ASC Executive Committee identified several concerns: lack of disclosure about the ratings; the unwillingness of Personnel Services to share how the factors were weighted and how point ranges for each level are calculated; salary ranges for each level; the preference for a neutral appellate body to review appeals; lack of training for ASC staff regarding how the point system works; lack of training for supervisors and managers of administrative staff regarding how to review and evaluate the questionnaires that were completed by their employees; confusion about the original purpose of the study; confusion regarding how the Mercer Study will fit into overall policies and procedures for administrative staff including all of the Handbook revisions that were put on hold by the Administration last year; why 48 positions were changed by the VPs after their original ranking; and the need to extend the deadline for the appeals process.

On the positive side, for the first time administrative staff have the beginnings of a salary structure in place, a commitment to raise the salaries of about thirty employees falling below the minimum for their range, and guarantees that there will be no salary caps and no salaries reduced.

Wayne Colvin introduced a resolution to Council addressed to Dr. Ribeau outlining concerns about the Mercer Study. There was lengthy discussion about the wording and tone of the resolution and Council members raised a number of issues and questions included the following:

- The refusal to release information has created an air of suspicion and mistrust in the process;
- The current process seems to be in direct opposition to the atmosphere of trust, collaboration and collegiality that Dr. Ribeau is promoting;
- Firelands had no representation on the initial Mercer Study Committee;
- In the Student Affairs area some employees have received points based on their old positions but their new title appears on the evaluation form;

- It is unclear how long staff (especially in Student Affairs) will have to wait to have their new positions evaluated and whether or not they will have the opportunity to go through the same appeals process;
- Where will the money come from to raise the salaries of those employees below the minimum? Will it come from next year's general salary increase?
- We have not received enough information to determine whether or not our positions were evaluated appropriately;
- All employees and supervisors should have been sent their scores whether or not they intended to appeal;
- What is the urgency in having the appeals completed by October 13th? If there is some urgency in getting this study to the Trustees by January 1st we need to understand what it is. Has the Department of labor imposed this deadline?
- What comparable institutions were used in the study?
- Discussions with constituents at other universities have indicated that the process has been negative at those schools too;
- Lack of information about the scoring has created suspicion that the process has been administered inconsistently or is flawed;
- We weren't told that the Vice Presidents would review the scoring and realign positions after the initial results were received. At this point the process lost its objectivity.
- The Vice Presidents who made the final decisions are now also the final appellate body.
- The Administrative Staff Council has not been given the opportunity to debate and discuss the issue surrounding the Mercer Study and proposed policies and procedures in our usual committee structure or meetings—in fact approved policies and procedures currently in place in the Handbook (market adjustments) as well as proposed Handbook changes have all been put on hold for the Mercer Study.

Whereas:

The Administrative Staff Council of Bowling Green State University supports President Ribeau's vision "...create a learning community which promotes technological literacy, partnerships, rational discourse and diversity through planning, assessment & participatory governance" as well as the President's goal to "promote values emphasizing collegiality, mutual respect & trust." (1)

Be it resolved that:

The Administrative Staff Council directs the Chair & Executive Committee to inform the President:

1. The Administrative Staff Council strongly supports the concept of the Mercer Study to help correct the problem of salary inequities among administrative staff;
2. The Administrative Staff Council is not in support of the current process given the information we have received to date and strongly feels the plan to propose the Mercer Study to the Board of Trustees in January is premature for the following reasons:
 - a. The process needs to be slowed down and the appeal date should be extended until these issues are resolved,
 - b. More complete information is needed,
 - c. Impartiality must be built into the appeals process,
 - d. Positions which have not been evaluated by Personnel Services should be completed as soon as possible and these staff members should have the same opportunity to go through the appeals process;

3. The implementation of this process should be delayed until such time as a complete, careful and thorough review of the process can be conducted by the Administrative Staff Council. The policies and procedures associated with the Mercer Study should be submitted to ASC as a whole for review and approval;

Be it further resolved:

The Administrative Staff Council directs the Chair and Executive Committee to request a meeting with Administrative Council before October 13th in an effort to begin to establish dialogue for reviewing and resolving the issues related to the Mercer Study;

The Administrative Staff Council directs the Chair to inform the president that the Council would welcome the opportunity to meet with him to discuss these issues.

(1) Dr. Ribeau's 1995-96 Goals

Passed October 5, 1995
Administrative Staff Council

Nov 1995

We have received a thank you from Dr. Ribeau for the resolution regarding the Mercer Study which was passed in October. The administration has been receptive to each of our suggestions: the process has been slowed down; we believe all data is now released and available for administrative staff to review; they have agreed to speed up evaluations that have not been completed; they have agreed to our request for a neutral appeals body; and they have agreed to provide information/training sessions regarding how the evaluations were scored. We have not received a date for ASC Executive Committee to meet with Ad Council but expect this to happen soon.

Council members can forward their suggestions for Administrative Staff to serve on the Appeals Committee to Bryan Benner. Any member of the Administrative Staff who is not submitting their own appeal and was not on the original committee can be nominated.

ASC will recommend that the Appeals Committee review appeals before they are reviewed by the area Vice President.

We want all proposed policies and procedures to come to Administrative Staff Council through the Personnel Welfare Committee for review, including issues like market adjustments, how frequently salary schedules will be adjusted, interim appointments, etc.

ASC should communicate to their constituents that they need to take a close look at the data and make an informed decision whether or not to appeal. Staff members working in the auxiliary areas or funded by grants should not be concerned with how increases will be paid.

A preliminary review of the data shows that approximately 120 positions were moved down by the VPs and 106 moved up. The VPs particularly impacted changes in Academic Affairs, the President's Area and Planning and Budgeting.

Pat Green & Duane Whitnire noted that the format of a new document released by Personnel this week would lead anyone looking at it to believe that the Committee and Mercer had reviewed all positions. Mercer reviewed only the benchmark positions. The Committee did not review any positions below about level 14/15. It also did not review Student Affairs or the Athletic Department. Members suggested that Personnel should correct and redistribute this document.

Council members expressed concerns that with so many changes made by the VPs the original study was invalid. The number of changes seemed to indicate that the VPs did not rely on the survey instrument to make decisions but instead went back to existing organizational charts, salary levels and perceptions of positions. This new data has further eroded confidence in how the process has been handled.

Pat Green suggested that with all of the information just released we should ask for an extension of the appeal deadline to allow staff to review the new documentation.

Council directed Executive Committee to request a 30 day extension of the appeals deadline assuming that no new additional information will be released and that all staff members who are waiting to have their positions evaluated will have a reasonable amount of time after receiving their evaluations to prepare appeals.

Dec 1995

The deadline for Mercer appeals is over (with the exception of some positions in the Student Affairs area). The following individuals will review all appeals prior to input from the area Vice Presidents: Ann Bowers, Jeff Grilliot, Deb Wells, Greg Jordan, Deb McLaughlin, Tom Glick and Keith Pogan.

These individuals will receive training by staff in Personnel Services. In order to develop a consistent, objective and equitable process for the committee to follow the ASC Executive Committee has developed an "Appeals Committee Policy Statement" and rating form for use by the Appeals Committee during its review. Bryan will forward this policy statement to the Vice Presidents with the Council's recommendation that it be used to guide the work of the Appeals Committee.

Discussion from the Council included a suggestion that the Appeals Committee should be trained directly by Mercer rather than Personnel Services. Council members expressed concerns that they have received comments from VPs or their staff that indicates they have been reading and commenting on the appeals as they have come into their offices prior to their review by the Appeals Committee.

When the ASC Executive Committee met with Ad Council they were specifically told that the money ^{from} any salary increases mandated by the Mercer Study would come from a general University-wide salary pool. We have now received information from some areas that they are being told that appeals that result in a salary increase must be funded from their individual budgets. This problem exists primarily for auxiliary and grant funded areas. There is concern that the managers are being put in the position of being unable to approve appeals because the administration has not provided specific details to all budget administrators about how these salary increases will be funded. No reassurance has been given to the auxiliary areas that they will not be forced to cover salary increases from their own operating budgets or by eliminating positions or not filling vacant positions.

Council members questioned whether the fact that the proposed salary pool for 1996 had dropped from 5% in 1995 to 3% in 1996 indicated that the 2% difference was being reserved for Mercer salary adjustments. It is unclear that the administration has any specific plan in place.

Council approved the "Appeals Committee Policy Statement" (with minor editorial changes) along with a recommendation that the Appeals Committee be instructed to complete its review of all submitted appeals no later than March 15th, 1996.

Jan 1996

The Appeals Committee is going through its first day of training today. In response to some concerns expressed by administrative staff members Bryan has received assurance that members of the Committee will remove themselves from reviewing any appeals where there could be a conflict of interest because of a Committee member's working relationship with a staff member appealing. The appeals training is being done by staff from our Personnel Office. Mercer will not participate in the training. A total of 94 appeals had been submitted at the end of fall term.

Joan Morgan and Bryan met with Les Barber to discuss concerns of ASC related to the Mercer Study. Topics they discussed included reports that VPs had returned appeals to the front-line supervisors asking them to change their recommendations, concerns that some VPs referred to current employee salary levels as part of the basis for their review of positions, and questions about how raises will be funded in the Auxiliary and General Fee areas and grants. Bryan and Joan suggested that the University find a central

way to fund raises and requested that these discussions be public. Dr. Barber indicated that he would bring these issues to Ad Council and to the President.

It is still unclear how the Department of Labor is driving this process and Joe Luthman suggested that we find out specifically what the Department of labor has asked for from the University.

The ASC Executive Committee and Personnel Welfare Committee are meeting weekly to review the recommendations for policies and procedures after Mercer. In this initial phase of Mercer the difference between "appeals" and "reclassifications" has been confusing. Several staff members requested appeals because of changes in original job descriptions. The new policies and procedures will clarify how these issues will be addressed. The procedures will also ask that a cycle be set in place so that every position on campus is reviewed at regular intervals.

Bev Stearns asked Bryan to get clarification regarding exactly what will happen with the market adjustments put on hold prior to the Mercer Study.

Feb 1996

Guest Speaker: Sidney Ribeau

We are required by the Department of Labor to have a classification system in place for our administrative staff. There are things that could have been handled differently with the Mercer Study however we are confident that with the Council's input we have a good appeals process in place that will work through the remaining problems. The Mercer Study has highlighted the need to build trust between the administration & its employees. We must work to build respect for each other so that we can disagree in an atmosphere of trust. The mistakes made with the Mercer Study have taught us that we need to collaborate to create relationships that allow us to take on these difficult issues in better ways in the future

March 1996

Tom Glick reported that the Mercer Appeals Committee has reviewed approximately 130 appeals. Six have been returned to the appellant for additional information. Committee members are very concerned that there are some staff members who submitted their Job Analysis Questionnaire months ago to Human Resources but have not received notification from Human Resources of their evaluation. These staff members deserve to have their evaluations completed quickly so that they can have the opportunity to use the Appeals Process. The Appeals Committee plans to complete its work during the next two weeks and submit their report to Human Resources. Human Resources will distribute a form to all appellants with the recommendations of the Appeals Committee and their comments. Council requested that Bryan send a letter to President Ribeau and Bob Martin requesting that administrative staff be notified no later than April 15th of the recommendations of the Appeals Committee.

Bob Waddle presented a summary to Council of the proposed salary recommendations developed by the AC Salary Committee. The Committee reviewed the results of the College and University Personnel Association (CUPA) survey of salaries for the institutions in the State of Ohio. Modified Version 3.1 represents all BGSU CUPA positions found at at least five other institutions (without those positions currently filled by faculty and classified staff at BGSU). This version has been recognized by the Administration for the last six years as the one most appropriate for our salary recommendation. This year the report reflected a 2.48% BGSU loss from the state-side average salary from 94-95 to 95-96. The Salary Committee recommended that ASC continue its goal of attaining the status of at least 4th out of 11 in Ohio comparable institutions considered in the analysis. Although BGSU dropped from 7th to 10th place in the salary study this year, we are actually now 2.93% closer to the fourth place institution than we were one year ago. With a projected rate of inflation of 2.7% the Committee recommended that we request a 6.05% increase for 1996-97 contracts.

Sept 1996

July 22 - ASC Exec met with representatives from Ad council and discussed the following issues:

The inequity that only one employee group on campus will have salary caps

The process of salary levels moving annually

The progress for progressing through the salary range

Joan distributed copies of the Administrative Staff Compensation Plan being presented to the Board of Trustees to Council members.

A concern was raised that approximately 35 staff members still have not received any response to their job analysis questionnaire. Dawn Mays made a motion that the ASC Chair contact Human Resources and inquire as to the missing information. Mary Beth Zachary seconded the motion.

The Administrative Staff salary table has been increased by 2.8% for 1996-1997.

Joan Morgan and Duane Whitmire have expressed opposition to the 5% increase in salary that was proposed for administrative staff moving to a higher position or level. Classified staff receive an 8% increase in this situation. ASC reps are encouraged to discuss their issue with their constituents as the Mercer Group made the initial 10% recommendation that ASC supported.

Oct 1996

Mercer Updates/Concerns

As significant duties and responsibilities change, individuals should be able to initiate a reevaluation of their position.

Joan has asked Bryan Benner that Human Resources send a letter to those staff members who are below the minimum indicating that they will be receiving an increase. These letters were to be sent by October 11.

There is a concern that all staff members who fall into this category are not being identified.

Joan has requested that a letter from Human Resources go to all staff who are at the maximum salary range outlining the appeal process.

How will auxiliary or grant funded areas receive future funding to cover the costs of bringing staff up to the minimum salary range?

Mercer – Phase 2

ASC must be proactive in our input into this process.

A current list is needed of each position and current ranking. This has been requested of Human Resources.

A policy recommendation is needed as to how staff can progress through a salary range. PWC will be working on this issue.

Nov 1996

Mercer Concerns – Concerns have been expressed that many administrative staff have a lack of trust with regard to how the compensation plan was established. There are still questions as to whether or not all salaries below the minimum of their range have been brought up to the appropriate level. Human Resources has attempted to identify these individuals, but staff need to be pro-active in determining if their salary is at the minimum for their range. ASC will continue to follow up on Mercer concerns.

Dec 1996

Joan Morgan received notification from President Ribeau that ASC will receive a data set to assist the Personnel Welfare Committee in analyzing the impact of the Mercer study on administrative staff. Joan and Joe Luthman will work with Human Resources to further clarify our needs. A list should also be coming from Human Resources of all administrative staff positions and current salary levels.

May 1997

Salary:

Gene Palmer presented the Salary Committee's review of the 1996-97 CUPA results.

- BGSU salaries, when compared to the eleven Ohio institutions, rank seventh.
- Miami, Toledo, Ohio University and Kent have consistently ranked higher than BGSU over the past seven years.
- The CUPA analysis is based on 93 administrative staff positions at BGSU. 87 of these positions are in the Mercer grades fourteen or higher. This report provides no insight for positions below grade fourteen, gender/ethnic issues or time in position.

- The committee recommends that BGSU salaries should be at a level consistent with Kent/Miami. To become a reality this will require an equivalent salary increase to that of Kent/Miami plus an additional 3.39% to equal Kent or an additional 3.823% to equal Miami. Providing salary increases higher than Kent and Miami over the next several years would have the same result.

March 1998

Salary: (Gene Palmer, Chair) - Jan Ruffner read the recommendation that was e-mailed to ASC members. Jan moved to accept, Carmen seconded. Pat Green explained the reasoning behind #2. It was suggested to amend the proposal to include the following under #2: While the pay ranges increase annually at 1% less than the total raise (combination of merit and across the board increase), it is recommended administrative staff receive an across the board increase equivalent to the increase in the pay range. For example, if the total raise is 3% and the pay range increases by 2%, the across the board raise should be 2%. This prevents administrative staff from moving backward in the pay range and possibly falling below the minimum. Pat moved to accept the amended change, Inge seconded. Matt Webb moved to suspend the rules, Deborah Knigga seconded. Motion approved. Motion to accept amended changes approved. Duane will send this proposal forward to Dr. Middleton by Friday, March 6.

Oct 1999

Updates on meetings with Rebecca Ferguson, director of Human Resources: Regarding the working out of President Ribeau's Compensation Plan, Ferguson had indicated that Ribeau had assigned the task of setting the benchmark for Administrative Staff Salaries to Human Resources. She had also indicated that Mercer would come in during the process to review pay ranges. It was also reported at Exec that the letter to supervisors regarding the need to establish merit criteria would be going out, a task which has since been accomplished.

Lopez and Zachary shared the ASC goals and the progress that has been made on them and expressed appreciation for the \$662 market adjustment to Administrative Staff salaries.

May 2000

Breakfast meetings with the Director of Human Resources (4/18 & 5/2)

- Year Two Compensation Plan: 12/31/99 is the adjustment determination date (for 9+ years and 5+ years adjustments). Those with a 12/31/1994 and before hire date included in 5+ years adjustment. Missing in the adjustment group are the group hired 1/1/95 to 12/31/95 before Mercer took effect on 1/1/96. The whole point of the PWC plan was to "place" individuals correctly that were hired before the Mercer Plan began and started to make an experience-based determination on where people were hired in at in their salary range. Ferguson brought a list of hires she found that fell into the above qualification. She showed Lopez that all but two of them had completed a Job Analysis Questionnaire. He convinced her to re-cut the data to include this group of people for their consideration of including them in the next round of adjustments.

- Mercer review of the ranges inquired about: How does it impact those at cap? Will there be a cap this year? If so, how will those at the cap be compensated for Merit they've earned in the last year? Can we have a list of those that will be at cap?

- Review of the ranges has not happened. When it does happen, Ferguson will be looking to make the "cap" issue moot. More to come later.
- Salary inversion/compression issues. Process of identifying and dealing with them? Will there be funds allocated for this?
 - HR will continue to deal with these issues as they are identified and Ferguson is confident there will be funds available to do that.

Oct 2000

Zachary also reported that she and John Clark have met in their regular meetings with the Director of Human Resources and also with Executive Vice President, Linda Dobb. In these meetings they have learned:

1.) that Mercer is in this week to gather data from which to evaluate the ranges. HR created a list of positions in each range with the position description and years in position. Mercer will select benchmark positions and run those against their market database. This analysis will take a couple of months. They'll let HR know their recommendations.

2.) Regarding the President's compensation plan year 3, HR will be identifying all positions that have not been yet touched by any of the actions to date in the compensation plan. The next step will be to identify positions for which we have market data because the positions are identified in the CUPA data. HR will then make a list of those not having market data. Those positions will have market data gathered.

Nov 2000

Human Resources:

- President's Compensation Plan-3rd year and after-- The year will cover a review of the ranges by Mercer, a discussion of the caps issue, and identification of those not yet dealt with in the past two years of compensation. Those who have market data available, (e.g. CUPA and Mid-Level-CUPA data) will be those who are targeted for market evaluations this year. HR will share with us how the total number of Administrative staff break out into the groups who have been or will be addressed in the President's Compensation Plan. Many positions have been covered already by being included in the first two years of the President plan, by submitting a new JAQ because there was a vacancy in the position, or because there existed a gross/blatant disconnect between the compensation for a position and the market.

Dec 2000

-Compensation

Wittwer then addressed compensation issues. Scott Cook from Mercer was hired to look at positions, especially those that are not competitive with the market. Two areas that are being looked at are ITS and Development. Some possible results could be that separate pay ranges are established for these areas or perhaps market adjustments are given. Caps are currently an issue because pay ranges were frozen. A question was raised as to why Administrative Staff are the only group with caps. The question was raised as to whether or not there is a percentile target for Administrative Staff salaries. There is not.

Wittwer next discussed the Administrative Compensation report she prepared for this meeting. The information presented is a scatter grain snapshot of the November payroll. Interim positions are not included because they skew the data. The report compares the number of years in current position to salary for 510 Administrative Staff members. This is shown by grade. The top of each grade chart is higher than the cap in order to allow those above the cap to be included. Discussion during the presentation included a variety of points. The observation was made that there is a preponderance of staff below the salary midpoint. The point was raised that there are several new hires who are earning more than those with more years in position. Wittwer said that in some cases the person could have been re-graded or the new staff may have had a lot of prior experience. The point was raised that there could be someone in a position for several years and someone new with similar experience is hired for more money. A suggestion was made to color code the dots in the report to differentiate those who were new to BGSU from those whose were already at BGSU and their positions were reevaluated. A question was asked about how to reevaluate a position. Wittwer suggested that a good time to reevaluate the Job Analysis Questionnaire would be at the time of the Performance Evaluation if it is shown that there is a need. The signature of the supervisor is required for a reevaluation. The observation was made that there is a shelf between those with 7 years or less and those with 9 years or more in position. One reason for this could be the fact that those positions occupied with the same person for 9 or more years were examined during the first year of the Administrative Compensation Plan. The point was raised that although ASC may want to look at years of service, the administration does not. They want to look at merit. Also, if someone moved from a Classified Staff position to an Administrative Staff position, only the years in the Administrative Staff position were taken into account. Wittwer said that Human Resources is also looking at staff whose positions have not been reevaluated since 1994 to see if the positions are in the appropriate grade level. When looking at positions, there are 2 issues. The first is the grade of the position, which measures the value of the position. The second issue is the salary, which has to do with the value of the person in that position. The observation was made that the University is not doing market reviews of positions unless a person receives an offer elsewhere or there is a request for a market review from a University vice president. It was

mentioned that PERS has increased benefits for those with more than 30 years of service in order to encourage staff to work longer and that there are possible changes for new hires regarding defined benefit. The concluding point was made that the goal is to work toward fairness in Administrative Staff salaries.

Human Resources:

Most discussions encompassed the information to be presented to the Council on December 7th. Topics to be addressed briefly include: An update on work with Mercer; year 3 of the compensation plan; and overall admin staff compensation picture (perhaps in the form of scatter-grams); health insurance challenges and open enrollment; FMLA; performance evaluation; teaching compensation; changes in % of PERS payments after 30 years of service; violence in the workplace. The appropriate ASC committees will follow up on topics that require pursuit.

Feb 2001

Past chairs also suggested that we continue to gather CUPA data and to develop the comparative positioning of BGSU in relation to the other institutions with which we have been compared in the past. Other efforts we should "not lose" in the transitions between chairs include continuing to pursue multi-year contracts for long-term successfully performing administrative staff, promotions through the university, progress through the ranges, and grievance processes for non-renewal of contract.

Questions that we need to answer include, has the mercerization of compensation helped those people we intended to help? Have we explored all the options we could with a compensation plan? For instance, could we "broad-band" ranges meaning could we shift to fewer levels and have broader pay ranges with which they are associated. Might there be an effective way to do away with caps? For the size of our student population, how do we compare in numbers of staff? How are we going to address the morale and equity concerns associated with caps? Bonuses may be one way to address the inequities presented by the compensation plan policies enacted by BGSU. If we are truly to be a merit-driven system, then performance must be rewarded the same way for all individuals. If merit is earned, merit should be paid. How has the plan worked to date for all staff? Certainly, minimum salaries have been improved. How has it worked for others? Should market area be the same for all positions? Could there be other ways to improve compensation? Could we, for instance, receive a higher percentage of payment for unused sick leave at retirement? Could we identify the necessary skills for individuals to move into higher level positions?

President's Office

In a meeting with Eileen Sullivan, John Clark and I raised several issues of concern to administrative staff, one of which was again attending the meeting with Scott Cook of Mercer.

Scott Cook of Mercer

The meeting with Scott Cook of Mercer included:

- Executive Vice President Linda Dobb
- Rebecca Ferguson and Donna Wittwer of Human Resources
- Ann Bowers, Paul Yon, and Bryan Benner past chairs of ASC
- Joe Luthman representing ASC PWC
- Dave Garcia representing ASC Salary Committee
- John Clark and Mary Beth Zachary, ASC chair-elect and chair respectively.

Mr. Cook gave us a thumbnail sketch of how Mercer develops ranges. Mercer has a library of surveys and market tools from which they pull information about positions. Some of the surveys are highly specialized, but still they run their own surveys and purchase many others. Most of what they use for higher education is based on higher education surveys and data. They do use, however, some industry surveys in developing ranges. They include industry data to make sure our salaries are competitive. What are the markets to which we are compared? Perhaps the answer for BGSU is from where do we recruit? He will also be determining market for benchmark positions, which were provided by HR with input from administration. BGSU targeted the 50th percentile (median) as the goal for its benchmark comparisons. Mercer will work to provide external equity or competitiveness for those positions. Regarding CAPS, Mercer gave several possible ways to address caps. Bonuses are one way to offer compensation for meritorious work. Other

topics addressed practices regarding salary movement to the midpoint and after the midpoint and weighting of job analysis questionnaire elements.

Personnel Welfare

The committee members are performing research work in order to formulate a recommendation to ASC Executive Committee on the rotation process for the Administrative Staff Advisory Team. This group hears Job Analysis Questionnaire appeals. The research includes discussions with advisory team members and Human Resources, along with investigating other University appeal processes at similar-structured schools in Ohio, Michigan, and Indiana.

April 2001

Administrative Staff Council hopes to enter into a plan-building discussion to articulate policies and procedures regarding the following:

- o Range evaluation and movement of ranges
- o Periodic, systematic market review of all positions
- o Acceleration to/toward range midpoint (a Mercer assumption)
- o Salary progression throughout the ranges
- o Salary inversions and egregious compressions

May 2001

- Scott Cook, from Mercer, will be returning to BGSU on May 23rd for further consultation. One of the issues he will be discussing is movement of the pay ranges. John Clark and Mary Beth Zachary will get to meet with Mr. Cook for one hour. Clark asked for questions from ASC.
- Responding to Clark's request for feedback on Clark and Zachary's March 14th presentation to the President's Compensation Working Group, Executive Vice President Dobb stated that the Working Group clearly heard the need to bring administrative staff with five or more years in position up to at least the first quartile of their pay range. Other issues, Dobb stated, will require further discussion between ASC and Human Resources.
- In later discussion, President Ribean agreed that it is prudent for ASC and HR to create together a comprehensive, systematic compensation plan for administrative staff. As the President stated, we must plan for the time when we will have money, so that we can appropriately reward employees who have supported the institution through more difficult financial times.

Notes from Mercer Meeting: 5/23/01

On May 23, 2001, ASC representatives John Clark, Laura Emch, and Mary Beth Zachary met with Mercer, Inc. consultant Scott Cook, HR representatives Becca Ferguson and Donna Wittwer, and EVP Linda Dobb to discuss Mercer's follow-up recommendations on administrative staff compensation to the President's Compensation Working Group. The following are notes from that meeting, compiled by John M. Clark—2001-2002 ASC Chair.

1. Mercer's History with BGSU: In 1995, Mercer came to BGSU to assess the market competitiveness of our administrative/professional staff compensation. In particular, their focuses were 1) base pay, 2) pay ranges, and 3) review of IT positions.
2. In 2001, Mercer conducted a follow-up study based on 57 "benchmark" administrative positions. These positions were chosen as benchmarks by the vice presidents based on their representativeness of the entire administrative employee group.
3. This year's Mercer study, special emphasis again was given to IT positions.
4. Mercer compiled salary data from 24 surveys, reflective of salary medians, representative of our geographic recruiting area (for each benchmark position), and *adjusted to July 1, 2001* (i.e., the data were "aged" to be representative of the market on the beginning of our next fiscal year.).

5. Data matching was done based on job content, not type of position. (This reinforces Mercer's consistent focus on skill sets rather than department or specific position.)

6. Elements of Mercer's Competitive Assessment

- Actual salaries and pay ranges compared to [recruiting area] market.
- Variance between ratios not typical
 - ^Actual salary ratios may vary due to differences in employee credentials
 - ^Midpoint ratios may vary due to valuation differences placed on the position by different institutions (a one-grade difference from "market" is OK, but not three or four grades difference in a position)
 - ^IT is judged separately
- Ratios calculated by comparing...
 - ^actual salaries to market (average of all incumbents in a position)
 - ^range midpoints to market

7. Actual Salary Competitiveness:

- In 1995, all administrative/professional jobs at BGSU were at 99% of market (market being the 50th percentile for each position, this means our average was the 49.5 percentile)
- In 2001, all administrative jobs at BGSU, as a group, are at 95% of market (or 47.5 percentile)
- Our IT are presently worst in relation to market—88% or 44th percentile
- *Distribution* in relation to pay range and market is also crucial; the above percentiles are averages, and individual persons or position can be higher or lower than BGSU average

8. Pay Structure Competitiveness:

- The administrative/professional ranges, as an aggregate, now are at 89% (44.5 percentile) of market—these ranges were set in 1995 exactly at 100%, or the 50th percentile, of market
- Our IT pay ranges are now at 83% of the market, or the 41.5 percentile
- "Outliers" could be inappropriately graded, or the market valued the job differently than the institution (e.g., pharmacists, physicians, IT)

9. Salary Range Placement:

- Ranges set at 100% of market (50th percentile) in 1995
- In January, 1996, implementation of the BGSU Mercer Plan raised administrative employees only to minimum of range
- This implementation also created some salary compression—brought some newer employees close to the salaries of longer-term employees in the same unit and/or similar position
- Midpoint (50th percentile of pay range) is Mercer's recommended market target for admin.
- Mercer also notes that the market "norm" for administrative/professional positions is for employees to reach midpoint of pay range within 4 to 7 years in position

10. A Mercer Model for Advancement through Pay Range:

- Mercer posits that administrative employees in the first quartile, minimum to 25th percentile, should be in the "learning and growing" stage for the position (and, conversely, that employees beyond the learning and growing stage should be higher in the pay range)
- Mercer considers administrative employees in the second pay range quartile, 26th percentile to midpoint, "seasoned and competent" for their positions
- Mercer considers administrative employees in the third pay range quartile, 51st to 75th percentiles, "outstanding and sustained performers" for their positions
- Mercer considers administrative employees in the top pay range quartile, 76th percentile to range maximum, inhabitants of "premium territory"—employees whose base salary at the beginning of the contract year puts them among the highest paid in the market for their positions

- Mercer notes that "best practice" of institutions across the U.S. now considers it appropriate for 15-20% of the total workforce to be in the "outstanding sustained performance" and "premium" salary levels—and that these base salaries relative to market for the positions be established by performance, not longevity alone
- Finally, Mercer notes that best compensation practices or plans across the country include a pay and performance-reward package to accelerate movement of good performers in years 0-7 (within position) to range midpoint

11. As consultant Scott Cook explained, the portion of "best compensation practice" least understood is that institutional expectations are much higher for the midpoint and up, "premium base pay area than for the minimum-to-midpoint (0-50th percentile) area. All of an employee's experience, knowledge, and superior performance over the years plus an excellent performance in the past equal a premium salary that might be increased for the upcoming year.

12. Range "Penetration":

- Average of all BGSU administrative/professional employees is 57th percentile of range
- Average years in position for all BGSU administrative employees is 6 years
- Increased penetration of range by some administrative staff could be offset by decreased penetration by others

13. Mercer Recommendations:

- Adjust pay ranges to align with market median (required adjustment = 8-9%); one option, if range adjustments of this magnitude is unmanageable, would be smaller pay-range increases (smaller than 8-9%) over the next one to three years—a phasing-in approach
- Re-examine internal pay-range placements of positions in the Development area
- Establish a separate pay range structure for IT positions
- Re-evaluate significant outliers with respect to midpoint ratios (positions significantly out of market norm relative to the position pay range)
- Review current employee salaries, after the structural or pay-range adjustment, to re-establish internal and external pay equity

Sept 2001

Salary market adjustment distributions: Five administration staff hired in position in 1995 (prior to Mercer implementation) received in August 2001 (retroactive to 7/1/01) market adjustment distributions H.R. considers commensurate with the group who had 5-8 years in position as of 12/31/99. "Commensurate," in this context, was defined as "3rd quartile between the minimum and first quartile . . . of . . . pay grade." To recap, all administrative staff with 9 or more years' experience in position as of 12/31/99 were brought up to the midpoint of their 99/00 pay ranges in May 2000. In August of 2000, employees with 5-8 years' experience in their current positions were brought to a specified position within their 99/00 pay ranges and closer to the midpoint. (Source: BGSU office of Human Resources.) As of 12/31/00, a strong majority of this 5-8 group (as of 12/31/99) was at or above pay range midpoint. Notably, the small group of employees who most recently received market adjustment distributions—employees now serving their 7th year in current position—still are below 1st quartile in their pay ranges and below many of their peers who started in position 1998-2001.

Jan 2002

Joyce Bliim asked Dr. Folkins to speak about the recent return of Mercer to campus. He indicated that the study went to Human Resources. Rebecca Ferguson can address the findings.

May 2002

Our presentation to the Administrative Compensation Working Group was well received. Late-breaking statistics show that administrative merit awarded over the past five years slightly outpaced national

inflation. At the same time, however, our aggregate pay ranges lost 7 percentile points to our competitive market. We have recommended a 4.2% increase in all pay ranges, as a catch-up. We also have recommended that Mercer come in every three years to recalibrate our pay ranges.

Additional stats:

Our aggregate "range penetration" (average for all) as of March 2002 was 49th percentile (remember that our ranges are out of balance with the market, however)

In grades 18-22, 58 staff average 81st percentile of range, approx. 9 staff over maximum

In grades 16 & 17, 134 staff average 60th percentile of range, approx. 47 staff below midpoint

In grades 14 & 15, 196 staff average 39th percentile of range, approx. 114 staff below midpoint

In grades 9-13, 147 staff average 39th percentile of range, approx. 103 staff below midpoint

We also recommended to the Compensation Group a 5% base merit increase for 2002-03 and a 1.5% super merit pool.

Feb 2003

Salary: Dave Garcia reported that the committee has not received the CUPA data yet. Donna Wittwer indicated that CUPA had questions for HR that had been answered, and she hoped to have the data shortly. Dave reported that each committee member has been assigned two or three state institutions to research salary and benefit information. They will be contacting the institutions' human resource departments. Dave mentioned that if Ohio's proposed income tax changes do not go through then the possibility for raises is questionable. Laura Emch indicated that whether the money is available or not, the information is vital. John Clark agreed saying that this data can then be used historically.

Dave Crooks asked if it was appropriate to seek information from institutions when Mercer provides information. The response was that Mercer compares our reality to the outside market and is composite data. CUPA is person specific.

Joe Luthman asked why some institutions such as Ohio State and University of Cincinnati were being excluded from the research. Dave responded that these two institutions tend to have higher salaries and are not seen as comparable to BGSU. Laura asked if the faculty exclude institutions when looking at their salary information. John Clark responded that they do not as their market is seen as nationwide. Joe asked if we should gather information from "premier institutions" if our goal is to be a premier institution. John Clark responded that it is hard to do a comparison because of the size of the offices at institutions such as Ohio State.

Laura Emch asked that the committee ask the institutions how much compensation issues have changed that might influence salaries. As an example she gave an institution might receive a 1% raise but health care costs increased 3%.

Jan 2004

Personnel Welfare/Salary

Committee met with HR to discuss ASC compensation and ways to advance staff to the mid point of their salary ranges. According to the Mercer report, staff should reach the midpoint within 4-7 years of employment. Advancements beyond that point would require exemplary performance. HR recommended that ASC create a salary range plan, in addition to the annual salary recommendation, that would address these concerns and show how staff would be moved up the scale. It was further recommended that ASC find ways to set-up a pool of money to be used to pay these staff members (Faculty were able to use a pool of money they saved from ERIP). An electronic version of top administrative staff status' (showing years served, pay rates, etc.) was received by committee chairs and is currently under analysis. Longevity, not just new hires will be reviewed. President's Council would like recommended compensation plan for 2004-2005 by 2/29/04.

Feb 2004

The mid-point (aka Market Value, per HR) shall be reached within 4 – 7 years of new hires who are "meeting expectations" according to the Mercer Compensation Report (May 2001). HR report indicate most lower-mid pay grade administrative staff members are hired in at the 25-50% quartile and only

progress through ranges when they have not only "met expectations" but have also performed "meritoriously." Higher pay grade employees (pay grade 19, 20, 21) are usually hired in at market value or above (75th percentile). Council's suggestion was to set a specific number of years (4) to get to the mid-point rather than use a range, as well as keep in mind the implementation period in doing so. By setting a set year, plans could be implemented to make sure the four year mark is met when staffs are at least meeting expectations.

The 2nd discussion point given priority was moving beyond the mid-point, specifically for longer serving employees. Currently the data indicates that once employees reach the mid-point they typically get stuck there, despite how long they have been in the position. Careful consideration must be given to ensure that both groups of staff (below and at the mid-point) are not penalized by helping one group over the other. This may provide some incentive for long term employment vs. the average 3-5 year turnover common among administrative staff.

Others items of discussion include:

- (1) A review of the salary ranges. Have the salary ranges been adjusted frequently enough to keep up with the changes in the market? If market value for some staff falls in the 75th percentile, then shouldn't the ranges be adjusted for all staff when the 50th percentile is used for market value hires?
- (2) Recommendation for 10% minimum salary increase for serving in an acting interim role in a higher salary graded position or having a Mercer position Job Description rewriting resulting in a higher salary grade.

May 2004

. The President's Compensation Committee ended up taking all 6 of ASC's compensation discussion topics to the President's Cabinet for further discussion.

- They are aware that we are continuing to formulate a plan to bring all employees to the mid point of their respective salary range by a certain year.
- They understand that the salary ranges must be adjusted to maintain competitiveness in the marketplace and are making adjustments for this coming year. Mercer will be visiting in 2005 to evaluate that movement and see how far off we are from the market.

Bowling Green State University

Administrative Staff Council

215 East Hall
Bowling Green, OH 43403
(419) 372-7885



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Bowling Green State University

W. Mercer

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September 13, 1996

MEMORANDUM

TO: ALL BGSU ADMINISTRATIVE STAFF MEMBERS
FROM: Sidney A. Ribeau, President *Sidney Ribeau*
RE: Our New Administrative Staff Compensation Plan

I realize that this message may not reach you for several days because of the complicated logistics required for mailings to large numbers of people, but immediately after our Board of Trustees' meeting today, I write to inform you that the Trustees have adopted the Administrative Staff Compensation Plan. A copy of the basic policies associated with the Plan is attached.

A few comments of my own may be helpful. We have traveled a long and many times arduous road on this "Mercer" journey. However, I think we can now all have pride in the fact that together we have taken this important step forward in assuring that salaries for administrative staff are established and maintained in a fair and equitable manner.

It is extremely pleasing to note that the plan is already having a salutory effect in setting appropriate, equitable entry-level salaries for new hires. It is also very gratifying to know that, effective with their October 1996 paychecks, individuals whose salaries are below the minimums for their new grades will have the planned salary adjustments made, retroactive from January 1, 1996.

I do know, of course, that some of you remain deeply concerned about certain aspects of this plan which the Trustees have now adopted. The leadership of Administrative Staff Council has made this clear to us, as have some of you individually. The chair and chair-elect of ASC have particularly stressed two policy areas in discussions with the administration and the Trustees. I would like to comment briefly on each of them.

- 1) Many of you would like to see a higher guaranteed salary increase for individual staff members who are promoted, temporarily reassigned or reevaluated to a higher grade. The plan guarantees at least 5%, while ASC recommended 10%. The qualifying phrase "at least" is very significant in this context. In the designated circumstances, no salary increase will be less than 5%, but many will be higher, I'm sure, depending on the individual's new responsibilities. Some may be as much as 10% or more, if there are substantial increases in responsibility associated with the new grade and if an affected individual is a person of superior talent and merit.

BGSU Administrative Staff
September 13, 1996
Page Two

- 2) Many of you also continue to be concerned about the so-called "caps" policy. The administration and Trustees have been told, for example, that only the administrative staff is being singled out with a restrictive salary policy. This is not true. The salaries of **all** employee groups are restricted in some way, either related to plan design or to market. While it may be true that a very small number of administrative staff could have their salaries temporarily frozen, after the three exemption years, administrative staff members who are highly motivated, skilled and efficient may earn substantial numbers of merit dollars over a period of years. While faculty members also earn merit dollars in the same way, their salaries are always constrained by market forces. Also, of course, in the classified staff salary plan, members cannot earn more than the percentage amounts designated in their annual salary pools.

It is vital that we be honest about our goals. We have established a compensation plan to help guarantee equitable salaries for administrative staff members. If we were to exempt some staff members permanently from the terms of the plan, allowing their salaries to advance beyond the grade maximums--whether by increases to base salary or by bonuses--we would not have an equitable plan. By definition, in that case, we would be guaranteeing some individuals an inequitable advantage over all the rest. We cannot afford to begin our new plan that way.

In addition, I want you to know that I am committed to the position that professional development opportunities and training must be available to our staff. Such opportunities will help mitigate the possible negative effects of salary grade maximums.

As two or three of the Trustees said during the meeting this morning, we now have a plan officially in place, but the details of that plan are not cast in stone. Experience may move us to make changes. We will continue to listen carefully to comments and recommendations from ASC and its leadership. If fine tuning of the plan is needed, I'm confident that it will happen.

I believe that with the help and hard work of many individuals--members of the university administration as well as administrative staff members--BGSU is now positioned to meet some of the difficult challenges facing us both internally and externally. Thanks to all of you who have assisted. The Trustees and I are grateful. We look forward to walking forward together with you on the new road which now lies ahead of us.

Attachment

ADMINISTRATIVE STAFF COMPENSATION PLAN: RELATED POLICIES

1. Administrative staff members whose salaries are below minimum for grade will have their salaries brought up to minimum. The process by which that will be done is as follows.
 - (a) 1995-96 salaries for all individuals below the minimum for grade, based on the 1995-96 salary table, will be adjusted upward to the minimum, retroactive from January 1, 1996. Salary raises for 1996-97 will then be recalculated and moved upward, based on the adjusted '95-96 salary.
 - (b) A second salary table, time-adjusted for 1996-97, has now been constructed, based on recommendations from Mercer Inc. Individuals whose '96-97 salaries are still below minimum for grade on this new table will be brought up to the grade minimum, retroactive from July 1, 1996.
2. In general, Position Request and Authorization forms for administrative staff new hires will specify salaries with a range from the grade minimum to the midpoint. Listing a salary level higher than the midpoint for grade will require prior approval by the area vice president, after consultation with the offices of Human Resources and Affirmative Action.
3. In the event that a higher grade placement for an administrative staff member results from a revised position analysis, that person is guaranteed at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.
4. If an administrative staff member is promoted to a different position in a higher grade, that person is guaranteed at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.
5. When an administrative staff member is assigned to a position in a higher grade on an interim/temporary/acting basis, the following salary adjustment policy will apply. If the person's service in the new position is longer than 30 calendar days, s/he will receive a premium for the time served equal to at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.
6. In cases where an administrative staff member is demoted to a position in a lower grade, the person's salary will be lowered to a level in the new grade equivalent to his/her level in the original one.
7. In cases where an administrative staff member is transferred, in a lateral move, to another position at the same grade level and requiring approximately the same degree of skill, effort and responsibility, normally the individual's salary will not be adjusted.
8. A special market premium may be established for a particular job title when market conditions exist causing excessive turnover, when a salary level midpoint is well below market average for the job and/or when there is a failure of a current salary range to attract qualified candidates.
9. Beginning in 1997-98, the ranges for each grade will be adjusted in a three-year, recurring cycle. In the first two years of each cycle, the ranges for each grade will move up annually by an amount which is 1% less than the average salary increment paid to administrative staff that year. Every third year, beginning with 1999-2000, the University will conduct a reevaluation of the ranges in light of current market conditions, as well as other relevant factors, and adjust the ranges in light of that reevaluation.
10. BGSU will enforce salary maximums for all administrative staff positions, but it will exempt from the caps for a period of three years those administrative staff employees whose salaries are already above the maximums for their grades. Effective July 1, 2000, the salaries of any staff members still above their maximums will be frozen until such time as those salaries are within range. If at any time during the three years a staff member's salary should fall within range, the exemption ceases to apply to that individual and the maximum will be enforced.

Approved by the Board of Trustees
September 13, 1996



Bowling Green State University

W. Mercer

Office of the President
220 McFall Center
Bowling Green, Ohio 43403-0010
Phone: (419) 372-2211
FAX: (419) 372-8446

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September 13, 1996

MEMORANDUM

TO: ALL BGSU ADMINISTRATIVE STAFF MEMBERS

FROM: Sidney A. Ribeau, President *Sidney Ribeau*

RE: Our New Administrative Staff Compensation Plan

I realize that this message may not reach you for several days because of the complicated logistics required for mailings to large numbers of people, but immediately after our Board of Trustees' meeting today, I write to inform you that the Trustees have adopted the Administrative Staff Compensation Plan. A copy of the basic policies associated with the Plan is attached.

A few comments of my own may be helpful. We have traveled a long and many times arduous road on this "Mercer" journey. However, I think we can now all have pride in the fact that together we have taken this important step forward in assuring that salaries for administrative staff are established and maintained in a fair and equitable manner.

It is extremely pleasing to note that the plan is already having a salutory effect in setting appropriate, equitable entry-level salaries for new hires. It is also very gratifying to know that, effective with their October 1996 paychecks, individuals whose salaries are below the minimums for their new grades will have the planned salary adjustments made, retroactive from January 1, 1996.

I do know, of course, that some of you remain deeply concerned about certain aspects of this plan which the Trustees have now adopted. The leadership of Administrative Staff Council has made this clear to us, as have some of you individually. The chair and chair-elect of ASC have particularly stressed two policy areas in discussions with the administration and the Trustees. I would like to comment briefly on each of them.

- 1) Many of you would like to see a higher guaranteed salary increase for individual staff members who are promoted, temporarily reassigned or reevaluated to a higher grade. The plan guarantees at least 5%, while ASC recommended 10%. The qualifying phrase "at least" is very significant in this context. In the designated circumstances, no salary increase will be less than 5%, but many will be higher, I'm sure, depending on the individual's new responsibilities. Some may be as much as 10% or more, if there are substantial increases in responsibility associated with the new grade and if an affected individual is a person of superior talent and merit.

- 2) Many of you also continue to be concerned about the so-called "caps" policy. The administration and Trustees have been told, for example, that only the administrative staff is being singled out with a restrictive salary policy. This is not true. The salaries of **all** employee groups are restricted in some way, either related to plan design or to market. While it may be true that a very small number of administrative staff could have their salaries temporarily frozen, after the three exemption years, administrative staff members who are highly motivated, skilled and efficient may earn substantial numbers of merit dollars over a period of years. While faculty members also earn merit dollars in the same way, their salaries are always constrained by market forces. Also, of course, in the classified staff salary plan, members cannot earn more than the percentage amounts designated in their annual salary pools.

It is vital that we be honest about our goals. We have established a compensation plan to help guarantee equitable salaries for administrative staff members. If we were to exempt some staff members permanently from the terms of the plan, allowing their salaries to advance beyond the grade maximums--whether by increases to base salary or by bonuses--we would not have an equitable plan. By definition, in that case, we would be guaranteeing some individuals an inequitable advantage over all the rest. We cannot afford to begin our new plan that way.

In addition, I want you to know that I am committed to the position that professional development opportunities and training must be available to our staff. Such opportunities will help mitigate the possible negative effects of salary grade maximums.

As two or three of the Trustees said during the meeting this morning, we now have a plan officially in place, but the details of that plan are not cast in stone. Experience may move us to make changes. We will continue to listen carefully to comments and recommendations from ASC and its leadership. If fine tuning of the plan is needed, I'm confident that it will happen.

I believe that with the help and hard work of many individuals--members of the university administration as well as administrative staff members--BGSU is now positioned to meet some of the difficult challenges facing us both internally and externally. Thanks to all of you who have assisted. The Trustees and I are grateful. We look forward to walking forward together with you on the new road which now lies ahead of us.

Attachment

ADMINISTRATIVE STAFF COMPENSATION PLAN: RELATED POLICIES

1. Administrative staff members whose salaries are below minimum for grade will have their salaries brought up to minimum. The process by which that will be done is as follows.
 - (a) 1995-96 salaries for all individuals below the minimum for grade, based on the 1995-96 salary table, will be adjusted upward to the minimum, retroactive from January 1, 1996. Salary raises for 1996-97 will then be recalculated and moved upward, based on the adjusted '95-96 salary.
 - (b) A second salary table, time-adjusted for 1996-97, has now been constructed, based on recommendations from Mercer Inc. Individuals whose '96-97 salaries are still below minimum for grade on this new table will be brought up to the grade minimum, retroactive from July 1, 1996.
2. In general, Position Request and Authorization forms for administrative staff new hires will specify salaries with a range from the grade minimum to the midpoint. Listing a salary level higher than the midpoint for grade will require prior approval by the area vice president, after consultation with the offices of Human Resources and Affirmative Action.
3. In the event that a higher grade placement for an administrative staff member results from a revised position analysis, that person is guaranteed at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.
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Approved by the Board of Trustees
September 13, 1996



Bowling Green State University

W. Mercer

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125

September 13, 1996

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Approved by the Board of Trustees
September 13, 1996

Administrative Staff Pay Ranges by Grade 1999-2000

| Grade No. | Minimum | 1st Quartile | Midpoint 2nd Quartile | 3rd Quartile | Maximum |
|-----------|---------|--------------|--------------------------|--------------|---------|
| 5 | 15,885 | 17,673 | 19,459 | 21,246 | 23,033 |
| 6 | 17,077 | 19,045 | 21,015 | 22,984 | 24,952 |
| 7 | 18,392 | 20,563 | 22,734 | 24,905 | 27,076 |
| 8 | 19,838 | 22,236 | 24,632 | 27,029 | 29,427 |
| 9 | 21,435 | 24,084 | 26,733 | 29,383 | 32,032 |
| 10 | 23,197 | 26,129 | 29,061 | 31,993 | 34,925 |
| 11 | 25,146 | 28,395 | 31,642 | 34,889 | 38,138 |
| 12 | 27,303 | 30,906 | 34,508 | 38,111 | 41,713 |
| 13 | 29,694 | 33,696 | 37,695 | 41,697 | 45,697 |
| 14 | 32,348 | 36,795 | 41,244 | 45,692 | 50,139 |
| 15 | 35,295 | 40,246 | 45,198 | 50,148 | 55,099 |
| 16 | 38,574 | 44,094 | 49,611 | 55,130 | 60,647 |
| 17 | 42,228 | 48,386 | 54,543 | 60,702 | 66,860 |
| 18 | 46,301 | 53,182 | 60,061 | 66,943 | 73,824 |
| 19 | 50,849 | 58,547 | 66,244 | 73,943 | 81,641 |
| 20 | 55,935 | 64,559 | 73,180 | 81,805 | 90,428 |
| 21 | 61,628 | 71,300 | 80,973 | 90,645 | 100,317 |
| 22 | 68,011 | 78,874 | 89,737 | 100,601 | 111,462 |
| 23 | 75,176 | 87,392 | 99,607 | 111,824 | 124,039 |

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**BOWLING GREEN STATE UNIVERSITY ADMINISTRATIVE STAFF GRADE LEVEL
STRUCTURE 1998-1999**

| 102.0% | | | | | | | |
|---------------------------------------------------|---------|--------------|----------|--------------|---------|--------------|-------------------|
| 1998-1999 1998-1999 1998-1999 1998-1999 1998-1999 | | | | | | | |
| Midpoint | | | | | | | |
| 2nd | | | | | | | |
| Grade No. | Minimum | 1st Quartile | Quartile | 3rd Quartile | Maximum | Range Spread | Grd-Grd Increment |
| 5 | 15,574 | 17,326 | 19,077 | 20,829 | 22,581 | 45.0% | 8.0% |
| 6 | 16,742 | 18,672 | 20,603 | 22,533 | 24,463 | 46.1% | 8.2% |
| 7 | 18,031 | 20,160 | 22,288 | 24,417 | 26,545 | 47.2% | 8.4% |
| 8 | 19,449 | 21,800 | 24,149 | 26,499 | 28,850 | 48.3% | 8.5% |
| 9 | 21,015 | 23,612 | 26,209 | 28,807 | 31,404 | 49.4% | 8.7% |
| 10 | 22,742 | 25,617 | 28,491 | 31,366 | 34,240 | 50.6% | 8.9% |
| 11 | 24,653 | 27,838 | 31,022 | 34,205 | 37,390 | 51.7% | 9.1% |
| 12 | 26,768 | 30,300 | 33,831 | 37,364 | 40,895 | 52.8% | 9.2% |
| 13 | 29,112 | 33,035 | 36,956 | 40,879 | 44,801 | 53.9% | 9.4% |
| 14 | 31,714 | 36,074 | 40,435 | 44,796 | 49,156 | 55.0% | 9.6% |
| 15 | 34,603 | 39,457 | 44,312 | 49,165 | 54,019 | 56.1% | 9.8% |
| 16 | 37,818 | 43,229 | 48,638 | 54,049 | 59,458 | 57.2% | 9.9% |
| 17 | 41,400 | 47,437 | 53,474 | 59,512 | 65,549 | 58.3% | 10.1% |
| 18 | 45,393 | 52,139 | 58,883 | 65,630 | 72,376 | 59.4% | 10.3% |
| 19 | 49,852 | 57,399 | 64,945 | 72,493 | 80,040 | 60.6% | 10.5% |
| 20 | 54,838 | 63,293 | 71,745 | 80,201 | 88,655 | 61.7% | 10.7% |
| 21 | 60,420 | 69,902 | 79,385 | 88,868 | 98,350 | 62.8% | 10.8% |
| 22 | 66,677 | 77,327 | 87,977 | 98,628 | 109,276 | 63.9% | 11.0% |
| 23 | 73,702 | 85,678 | 97,654 | 109,631 | 121,807 | 65.0% | |

Administrative Staff Pay Ranges by Grade 2000-2001

| Grade No. | Minimum | 1st Quartile | Midpoint 2nd Quartile | 3rd Quartile | Maximum |
|-----------|---------|--------------|--------------------------|--------------|---------|
| 5 | 15,885 | 17,673 | 19,459 | 21,246 | 23,033 |
| 6 | 17,077 | 19,045 | 21,015 | 22,984 | 24,952 |
| 7 | 18,392 | 20,563 | 22,734 | 24,905 | 27,076 |
| 8 | 19,838 | 22,236 | 24,632 | 27,029 | 29,427 |
| 9 | 21,435 | 24,084 | 26,733 | 29,383 | 32,032 |
| 10 | 23,197 | 26,129 | 29,061 | 31,993 | 34,925 |
| 11 | 25,146 | 28,395 | 31,642 | 34,889 | 38,138 |
| 12 | 27,303 | 30,906 | 34,508 | 38,111 | 41,713 |
| 13 | 29,694 | 33,696 | 37,695 | 41,697 | 45,697 |
| 14 | 32,348 | 36,795 | 41,244 | 45,692 | 50,139 |
| 15 | 35,295 | 40,246 | 45,198 | 50,148 | 55,099 |
| 16 | 38,574 | 44,094 | 49,611 | 55,130 | 60,647 |
| 17 | 42,228 | 48,386 | 54,543 | 60,702 | 66,860 |
| 18 | 46,301 | 53,182 | 60,061 | 66,943 | 73,824 |
| 19 | 50,849 | 58,547 | 66,244 | 73,943 | 81,641 |
| 20 | 55,935 | 64,559 | 73,180 | 81,805 | 90,428 |
| 21 | 61,628 | 71,300 | 80,973 | 90,645 | 100,317 |
| 22 | 68,011 | 78,874 | 89,737 | 100,601 | 111,462 |
| 23 | 75,176 | 87,392 | 99,607 | 111,824 | 124,039 |

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| BOWLING GREEN STATE UNIVERSITY ADMINISTRATIVE STAFF GRADE LEVEL STRUCTURE | | | | | | | |
|---------------------------------------------------------------------------|-----------|--------------|--------------|--------------|-----------|--------------|-------------------|
| 2001-2002 | | | | | | | |
| | 2001-2002 | 2001-2002 | 2001-2002 | 2001-2002 | 2001-2002 | | |
| 103265.0% | | | Midpoint | | | | |
| Grade No. | Minimum | 1st Quartile | 2nd Quartile | 3rd Quartile | Maximum | Range Spread | Grd-Grd Increment |
| 5 | 16,404 | 18,250 | 20,094 | 21,939 | 23,785 | 45.0% | |
| 6 | 17,635 | 19,667 | 21,701 | 23,735 | 25,767 | 46.1% | 8.0% |
| 7 | 18,992 | 21,234 | 23,476 | 25,718 | 27,960 | 47.2% | 8.2% |
| 8 | 20,486 | 22,962 | 25,436 | 27,912 | 30,388 | 48.3% | 8.4% |
| 9 | 22,135 | 24,870 | 27,608 | 30,342 | 33,146 | 49.4% | 8.5% |
| 10 | 23,954 | 26,982 | 30,010 | 33,037 | 36,065 | 50.6% | 8.7% |
| 11 | 25,967 | 29,322 | 32,675 | 36,028 | 39,383 | 51.7% | 8.9% |
| 12 | 28,184 | 31,915 | 35,635 | 39,356 | 43,075 | 52.8% | 9.1% |
| 13 | 30,663 | 34,797 | 38,925 | 43,059 | 47,189 | 53.9% | 9.2% |
| 14 | 33,404 | 37,996 | 42,590 | 47,164 | 51,776 | 55.0% | 9.4% |
| 15 | 36,448 | 41,560 | 46,674 | 51,785 | 56,898 | 56.1% | 9.6% |
| 16 | 39,834 | 45,534 | 51,231 | 56,930 | 62,627 | 57.2% | 9.8% |
| 17 | 43,607 | 49,966 | 56,324 | 62,684 | 69,043 | 58.3% | 9.9% |
| 18 | 47,813 | 54,919 | 62,022 | 69,129 | 76,235 | 59.4% | 10.1% |
| 19 | 52,509 | 60,459 | 68,407 | 76,357 | 84,307 | 60.6% | 10.3% |
| 20 | 57,761 | 66,667 | 75,570 | 84,476 | 93,380 | 61.7% | 10.5% |
| 21 | 63,641 | 73,628 | 83,617 | 93,604 | 103,593 | 62.8% | 10.7% |
| 22 | 70,232 | 81,449 | 92,667 | 103,885 | 115,101 | 63.9% | 10.8% |
| 23 | 77,630 | 90,245 | 102,859 | 115,475 | 128,089 | 65.0% | 11.0% |

Administrative Staff Pay Ranges by Grade 2002-2003

| Grade No. | 1st Quartile | | Midpoint | | 3rd Quartile |
|-----------|--------------|--------|--------------|---------|--------------|
| | Minimum | | 2nd Quartile | | Maximum |
| 5 | 17,093 | 19,017 | 20,938 | 22,860 | 24,784 |
| 6 | 18,376 | 20,493 | 22,612 | 24,732 | 26,849 |
| 7 | 19,790 | 22,126 | 24,462 | 26,798 | 29,134 |
| 8 | 21,346 | 23,926 | 26,504 | 29,084 | 31,664 |
| 9 | 23,065 | 25,915 | 28,765 | 31,616 | 34,538 |
| 10 | 24,960 | 28,115 | 31,270 | 34,425 | 37,580 |
| 11 | 27,058 | 30,554 | 34,047 | 37,541 | 41,037 |
| 12 | 29,378 | 33,255 | 37,132 | 41,009 | 44,884 |
| 13 | 31,951 | 36,258 | 40,560 | 44,867 | 49,171 |
| 14 | 34,807 | 39,592 | 44,379 | 49,166 | 53,951 |
| 15 | 37,979 | 43,306 | 48,634 | 53,960 | 59,288 |
| 16 | 41,507 | 47,446 | 53,383 | 59,321 | 65,257 |
| 17 | 45,438 | 52,065 | 58,690 | 65,317 | 71,943 |
| 18 | 49,821 | 57,226 | 64,627 | 72,032 | 79,437 |
| 19 | 54,714 | 62,998 | 71,280 | 79,564 | 87,848 |
| 20 | 60,187 | 69,467 | 78,744 | 88,024 | 97,302 |
| 21 | 66,314 | 76,720 | 87,129 | 97,535 | 107,944 |
| 22 | 73,182 | 84,870 | 96,559 | 108,248 | 119,935 |
| 23 | 80,890 | 94,035 | 107,179 | 120,325 | 133,469 |

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| Grade No. | Minimum | 1st Quartile | Midpoint 2nd Quartile | 3rd Quartile | Maximum | Range Spread | Grd-Grd Increment | Updated Grd-Grd Incr. |
|-----------|---------|--------------|-----------------------------|-----------------|---------|-----------------|----------------------|-----------------------------|
| 5 | 17,093 | 19,017 | 20,938 | 22,860 | 24,784 | 45.0% | | |
| 6 | 18,376 | 20,493 | 22,612 | 24,732 | 26,849 | 46.1% | 8.0% | 7.5% |
| 7 | 19,790 | 22,126 | 24,462 | 26,798 | 29,134 | 47.2% | 8.2% | 7.7% |
| 8 | 21,346 | 23,926 | 26,504 | 29,084 | 31,664 | 48.3% | 8.4% | 7.9% |
| 9 | 23,065 | 25,915 | 28,765 | 31,616 | 34,538 | 49.4% | 8.5% | 8.0% |
| 10 | 24,960 | 28,115 | 31,270 | 34,425 | 37,580 | 50.6% | 8.7% | 8.2% |
| 11 | 27,058 | 30,554 | 34,047 | 37,541 | 41,037 | 51.7% | 8.9% | 8.4% |
| 12 | 29,378 | 33,255 | 37,132 | 41,009 | 44,884 | 52.8% | 9.1% | 8.6% |
| 13 | 31,951 | 36,258 | 40,560 | 44,867 | 49,171 | 53.9% | 9.2% | 8.8% |
| 14 | 34,807 | 39,592 | 44,379 | 49,166 | 53,951 | 55.0% | 9.4% | 8.9% |
| 15 | 37,979 | 43,308 | 48,634 | 53,960 | 59,288 | 56.1% | 9.6% | 9.1% |
| 16 | 41,507 | 47,446 | 53,383 | 59,321 | 65,257 | 57.2% | 9.8% | 9.3% |
| 17 | 45,438 | 52,065 | 58,690 | 65,317 | 71,943 | 58.3% | 9.9% | 9.5% |
| 18 | 49,821 | 57,226 | 64,627 | 72,032 | 79,437 | 59.4% | 10.1% | 9.6% |
| 19 | 54,714 | 62,998 | 71,280 | 79,564 | 87,848 | 59.4% | 10.3% | 9.8% |
| 20 | 60,187 | 69,467 | 78,744 | 88,024 | 97,302 | 60.6% | 10.5% | 10.0% |
| 21 | 66,314 | 76,720 | 87,129 | 97,535 | 107,944 | 61.7% | 10.7% | 10.2% |
| 22 | 73,182 | 84,870 | 96,559 | 108,248 | 119,935 | 62.8% | 10.8% | 10.4% |
| 23 | 80,890 | 94,035 | 107,179 | 120,325 | 133,469 | 63.9% | 11.0% | 10.5% |


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ADMINISTRATIVE STAFF PAY RANGES BY GRADE 2004-2005

| Grade No. | Minimum | 1st Quartile | Midpoint 2nd Quartile | 3rd Quartile | Maximum |
|-----------|---------|--------------|--------------------------|--------------|---------|
| 5 | 17,520 | 19,492 | 21,461 | 23,432 | 25,404 |
| 6 | 18,835 | 21,005 | 23,178 | 25,350 | 27,520 |
| 7 | 20,284 | 22,679 | 25,074 | 27,468 | 29,863 |
| 8 | 21,880 | 24,525 | 27,167 | 29,811 | 32,456 |
| 9 | 23,568 | 26,562 | 29,485 | 32,407 | 35,402 |
| 10 | 25,584 | 28,818 | 32,052 | 35,285 | 38,519 |
| 11 | 27,734 | 31,317 | 34,899 | 38,480 | 42,063 |
| 12 | 30,113 | 34,087 | 38,060 | 42,034 | 46,006 |
| 13 | 32,750 | 37,165 | 41,574 | 45,989 | 50,400 |
| 14 | 35,677 | 40,582 | 45,486 | 50,395 | 55,299 |
| 15 | 38,928 | 44,388 | 49,850 | 55,309 | 60,770 |
| 16 | 42,545 | 48,633 | 54,717 | 60,804 | 66,889 |
| 17 | 46,574 | 53,386 | 60,157 | 66,950 | 73,741 |
| 18 | 51,067 | 58,656 | 66,243 | 73,833 | 81,423 |
| 19 | 56,082 | 64,573 | 73,062 | 81,553 | 90,044 |
| 20 | 61,692 | 71,204 | 80,713 | 90,225 | 99,735 |
| 21 | 67,972 | 78,638 | 89,307 | 99,974 | 110,643 |
| 22 | 75,011 | 86,992 | 98,973 | 110,954 | 122,934 |
| 23 | 82,913 | 96,386 | 109,859 | 123,333 | 136,805 |

Office of Human Resources
100 College Park Office Building
(419) 372-8421 | Fax: (419) 372-2920

<http://web.archive.org/web/20041022222658/www.bgsu.edu/offices/ohr/comp>
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[ADMINISTRATIVE STAFF PAY RANGES BY GRADE 2005-2006]

| Grade No. | Minimum | 1st Quartile | Midpoint 2nd Quartile | 3rd Quartile | Maximum |
|-----------|---------|--------------|--------------------------|--------------|---------|
| 5 | 17,914 | 19,930 | 21,944 | 23,959 | 25,975 |
| 6 | 19,259 | 21,478 | 23,699 | 25,921 | 28,140 |
| 7 | 20,741 | 23,189 | 25,638 | 28,086 | 30,535 |
| 8 | 22,372 | 25,078 | 27,778 | 30,482 | 33,196 |
| 9 | 24,173 | 27,160 | 30,148 | 33,136 | 36,199 |
| 10 | 26,160 | 29,467 | 32,773 | 36,079 | 39,386 |
| 11 | 28,358 | 32,022 | 35,694 | 39,345 | 43,009 |
| 12 | 30,790 | 34,854 | 38,916 | 42,980 | 47,041 |
| 13 | 33,486 | 38,001 | 42,509 | 47,024 | 51,534 |
| 14 | 36,490 | 41,495 | 46,512 | 51,529 | 56,544 |
| 15 | 39,804 | 45,387 | 50,972 | 56,553 | 62,137 |
| 16 | 43,502 | 49,727 | 55,948 | 62,172 | 68,384 |
| 17 | 47,622 | 54,567 | 61,512 | 68,456 | 75,401 |
| 18 | 52,216 | 59,976 | 67,773 | 75,494 | 83,255 |
| 19 | 57,344 | 66,026 | 74,707 | 83,398 | 92,070 |
| 20 | 63,090 | 72,806 | 82,529 | 92,255 | 101,979 |
| 21 | 69,501 | 80,408 | 91,317 | 102,223 | 113,132 |
| 22 | 76,689 | 89,949 | 101,200 | 113,451 | 125,700 |
| 23 | 84,778 | 99,555 | 112,331 | 126,106 | 139,884 |

Office of Human Resources
100 College Park Office Building
(419) 372-8421 | Fax: (419) 372-2920

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Bowling Green State University

Truener

Office of the President
220 McFall Center
Bowling Green, Ohio 43403-0010
Phone: (419) 372-2211
FAX: (419) 372-8446

136

September 13, 1996

MEMORANDUM

TO: ALL BGSU ADMINISTRATIVE STAFF MEMBERS
FROM: Sidney A. Ribeau, President *Sidney Ribeau*
RE: Our New Administrative Staff Compensation Plan

I realize that this message may not reach you for several days because of the complicated logistics required for mailings to large numbers of people, but immediately after our Board of Trustees' meeting today, I write to inform you that the Trustees have adopted the Administrative Staff Compensation Plan. A copy of the basic policies associated with the Plan is attached.

A few comments of my own may be helpful. We have traveled a long and many times arduous road on this "Mercer" journey. However, I think we can now all have pride in the fact that together we have taken this important step forward in assuring that salaries for administrative staff are established and maintained in a fair and equitable manner.

It is extremely pleasing to note that the plan is already having a salutatory effect in setting appropriate, equitable entry-level salaries for new hires. It is also very gratifying to know that, effective with their October 1996 paychecks, individuals whose salaries are below the minimums for their new grades will have the planned salary adjustments made, retroactive from January 1, 1996.

I do know, of course, that some of you remain deeply concerned about certain aspects of this plan which the Trustees have now adopted. The leadership of Administrative Staff Council has made this clear to us, as have some of you individually. The chair and chair-elect of ASC have particularly stressed two policy areas in discussions with the administration and the Trustees. I would like to comment briefly on each of them.

- 1) Many of you would like to see a higher guaranteed salary increase for individual staff members who are promoted, temporarily reassigned or reevaluated to a higher grade. The plan guarantees at least 5%, while ASC recommended 10%. The qualifying phrase "at least" is very significant in this context. In the designated circumstances, no salary increase will be less than 5%, but many will be higher, I'm sure, depending on the individual's new responsibilities. Some may be as much as 10% or more, if there are substantial increases in responsibility associated with the new grade and if an affected individual is a person of superior talent and merit.

BGSU Administrative Staff
September 13, 1996
Page Two

- 2) Many of you also continue to be concerned about the so-called "caps" policy. The administration and Trustees have been told, for example, that only the administrative staff is being singled out with a restrictive salary policy. This is not true. The salaries of **all** employee groups are restricted in some way, either related to plan design or to market. While it may be true that a very small number of administrative staff could have their salaries temporarily frozen, after the three exemption years, administrative staff members who are highly motivated, skilled and efficient may earn substantial numbers of merit dollars over a period of years. While faculty members also earn merit dollars in the same way, their salaries are always constrained by market forces. Also, of course, in the classified staff salary plan, members cannot earn more than the percentage amounts designated in their annual salary pools.

It is vital that we be honest about our goals. We have established a compensation plan to help guarantee equitable salaries for administrative staff members. If we were to exempt some staff members permanently from the terms of the plan, allowing their salaries to advance beyond the grade maximums--whether by increases to base salary or by bonuses--we would not have an equitable plan. By definition, in that case, we would be guaranteeing some individuals an inequitable advantage over all the rest. We cannot afford to begin our new plan that way.

In addition, I want you to know that I am committed to the position that professional development opportunities and training must be available to our staff. Such opportunities will help mitigate the possible negative effects of salary grade maximums.

As two or three of the Trustees said during the meeting this morning, we now have a plan officially in place, but the details of that plan are not cast in stone. Experience may move us to make changes. We will continue to listen carefully to comments and recommendations from ASC and its leadership. If fine tuning of the plan is needed, I'm confident that it will happen.

I believe that with the help and hard work of many individuals--members of the university administration as well as administrative staff members--BGSU is now positioned to meet some of the difficult challenges facing us both internally and externally. Thanks to all of you who have assisted. The Trustees and I are grateful. We look forward to walking forward together with you on the new road which now lies ahead of us.

Attachment

ADMINISTRATIVE STAFF COMPENSATION PLAN: RELATED POLICIES

1. Administrative staff members whose salaries are below minimum for grade will have their salaries brought up to minimum. The process by which that will be done is as follows.
 - (a) 1995-96 salaries for all individuals below the minimum for grade, based on the 1995-96 salary table, will be adjusted upward to the minimum, retroactive from January 1, 1996. Salary raises for 1996-97 will then be recalculated and moved upward, based on the adjusted '95-96 salary.
 - (b) A second salary table, time-adjusted for 1996-97, has now been constructed, based on recommendations from Mercer Inc. Individuals whose '96-97 salaries are still below minimum for grade on this new table will be brought up to the grade minimum, retroactive from July 1, 1996.
2. In general, Position Request and Authorization forms for administrative staff new hires will specify salaries with a range from the grade minimum to the midpoint. Listing a salary level higher than the midpoint for grade will require prior approval by the area vice president, after consultation with the offices of Human Resources and Affirmative Action.
3. In the event that a higher grade placement for an administrative staff member results from a revised position analysis, that person is guaranteed at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.
4. If an administrative staff member is promoted to a different position in a higher grade, that person is guaranteed at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.
5. When an administrative staff member is assigned to a position in a higher grade on an interim/temporary/acting basis, the following salary adjustment policy will apply. If the person's service in the new position is longer than 30 calendar days, s/he will receive a premium for the time served equal to at least a 5% increase in salary OR the minimum salary for the new grade, whichever is greater.
6. In cases where an administrative staff member is demoted to a position in a lower grade, the person's salary will be lowered to a level in the new grade equivalent to his/her level in the original one.
7. In cases where an administrative staff member is transferred, in a lateral move, to another position at the same grade level and requiring approximately the same degree of skill, effort and responsibility, normally the individual's salary will not be adjusted.
8. A special market premium may be established for a particular job title when market conditions exist causing excessive turnover, when a salary level midpoint is well below market average for the job and/or when there is a failure of a current salary range to attract qualified candidates.
9. Beginning in 1997-98, the ranges for each grade will be adjusted in a three-year, recurring cycle. In the first two years of each cycle, the ranges for each grade will move up annually by an amount which is 1% less than the average salary increment paid to administrative staff that year. Every third year, beginning with 1999-2000, the University will conduct a reevaluation of the ranges in light of current market conditions, as well as other relevant factors, and adjust the ranges in light of that reevaluation.
10. BGSU will enforce salary maximums for all administrative staff positions, but it will exempt from the caps for a period of three years those administrative staff employees whose salaries are already above the maximums for their grades. Effective July 1, 2000, the salaries of any staff members still above their maximums will be frozen until such time as those salaries are within range. If at any time during the three years a staff member's salary should fall within range, the exemption ceases to apply to that individual and the maximum will be enforced.

Approved by the Board of Trustees
September 13, 1996

Bowling Green State University

Administrative Staff Council

215 East Hall
Bowling Green, OH 43403
(419) 372-7885



Notes from Mercer Meeting: 5/23/01

On May 23, 2001, ASC representatives John Clark, Laura Emch, and Mary Beth Zachary met with Mercer Inc. consultant Scott Cook, H.R. representatives Becca Ferguson and Donna Wittwer, and Executive V.P. Linda Dobb to discuss Mercer's follow-up recommendations on administrative staff compensation to the President's Compensation Working Group. The following are notes from that meeting, compiled by John M. Clark—2001-2002 ASC Chair.

1. Mercer's History with BGSU: In 1995, Mercer came to BGSU to assess the market competitiveness of our administrative/professional staff compensation. In particular, their focuses were 1) base pay, 2) pay ranges, and 3) review of IT positions.
2. In 2001, Mercer conducted a follow-up study based on 57 "benchmark" administrative positions. These positions were chosen as benchmarks by the vice presidents based on their representativeness of the entire administrative employee group.
3. In this year's Mercer study, special emphasis again was given to IT positions.
4. Mercer compiled salary data from 24 surveys, reflective of salary medians, representative of our geographic recruiting area (for each benchmark position), and *adjusted to July 1, 2001* (i.e., the data were "aged" to be representative of the market on the beginning of our next fiscal year).
5. Data matching was done based on job content, not type of position. (This reinforces Mercer's consistent focus on skill sets rather than department or specific position.)
6. Elements of Mercer's Competitive Assessment
 - Actual salaries and pay ranges compared to [recruiting area] market
 - Variance between ratios not typical
 - ◊ Actual salary ratios may vary due to differences in employee credentials
 - ◊ Midpoint ratios may vary due to valuation differences placed on the position by different institutions (a one-grade difference from "market" is OK, but not three or four grades difference in a position)
 - ◊ IT is judged separately
 - Ratios calculated by comparing. . .
 - ◊ actual salaries to market (average of all incumbents in a position)
 - ◊ range midpoints to market

7. Actual Salary Competitiveness:

- In 1995, all administrative/professional jobs at BGSU were at 99% of market (market being the 50th percentile for each position, this means our average was the 49.5 percentile)
- In 2001, all administrative jobs at BGSU, as a group, are at 95% of market (or 47.5 percentile)
- Our IT are presently worst in relation to market—88% or 44th percentile
- *Distribution* in relation to pay range and market is also crucial; the above percentiles are averages, and individual persons or positions can be higher or lower than BGSU average

8. Pay Structure Competitiveness:

- The administrative/professional ranges, as an aggregate, now are at 89% (44.5 percentile) of market—these ranges were set in 1995 exactly at 100%, or the 50th percentile, of market
- Our IT pay ranges now are at 83% of market, or the 41.5 percentile
- “Outliers” could be inappropriately graded, or the market valued the job differently than the institution (e.g., pharmacists, physicians, IT)

9. Salary Range Placement:

- Ranges set at 100% of market (50th percentile) in 1995
- In January, 1996, implementation of the BGSU Mercer Plan raised administrative employees only to minimum of range
- This implementation also created some salary compression—brought some newer employees close to the salaries of longer-term employees in the same unit and/or similar position
- Midpoint (50th percentile of pay range) is Mercer’s recommended market target for admin.
- Mercer also notes that the market “norm” for administrative/professional positions is for employees to reach midpoint of pay range within 4 to 7 years in position

10. A Mercer Model for Advancement through Pay Range:

- Mercer posits that administrative employees in the first quartile, minimum to 25th percentile, should be in the “learning and growing” stage for the position (and, conversely, that employees beyond the learning and growing stage should be higher in the pay range)
- Mercer considers administrative employees in the second pay range quartile, 26th percentile to midpoint, “seasoned and competent” for their positions
- Mercer considers administrative employees in the third pay range quartile, 51st to 75th percentiles, “outstanding and sustained performers” for their positions
- Mercer considers administrative employees in the top pay range quartile, 76th percentile to range maximum, inhabitants of “premium territory”—employees whose base salary at the beginning of the contract year puts them among the highest-paid in the market for their positions
- Mercer notes that “best practice” of institutions across the U.S. now considers it appropriate for 15-20% of the total workforce to be in the “outstanding sustained performance” and “premium” salary levels—and that these base salaries relative to market for the position be established by performance, not longevity alone

- Finally, Mercer notes that best compensation practices or plans across the country include a pay and performance-reward package to accelerate movement of good performers in years 0-7 (within position) to range midpoint

11. As consultant Scott Cook explained, the portion of “best compensation practice” least understood is that institutional expectations are much higher for the midpoint-and-up, “premium” base pay area than for the minimum-to-midpoint (0-50th percentile) area. All of an employee’s experience, knowledge, and superior performance over the years plus an excellent performance in the past equal a premium salary that might be increased for the upcoming year.

12. Range “Penetration”:

- Average of all BGSU administrative/professional employees is 57th percentile of range
- Average years in position for all BGSU administrative employees is 6 years
- Increased penetration of range by some administrative staff could be offset by decreased penetration by others

13. Mercer Recommendations:

- Adjust pay ranges to align with market median (required adjustment = \$-9%); one option, if range adjustment of this magnitude is unmanageable, would be smaller pay-range increases (smaller than \$-9%) over the next one to three years—a phasing-in approach
- Re-examine internal pay-range placements of positions in the Development area
- Establish a separate pay-range structure for IT positions
- Re-evaluate significant outliers with respect to midpoint ratios (positions significantly out of market norm relative to the position pay range)
- Review current employee salaries, after the structural or pay-range adjustment, to re-establish internal and external pay equity

ADMINISTRATIVE STAFF

BGSU Performance Appraisal

The University has established the following guidelines to assist you with assessing performance, which is a continuous process occurring throughout the year. The purpose of performance appraisal is to help facilitate the growth and development of individuals; and, in so doing, provide for the growth and development of the organization. A performance appraisal process for Administrative Staff should

- clearly define job expectations
- improve communication between employee and supervisor
- align employee goals with the overall goals of the University, college or department
- link performance with rewards such as compensation increases, promotions, recognition, assignments, professional development opportunities and career advances
- be consistent across University departments and areas
- identify employee training and professional development needs
- establish clear-cut intervention strategies when performance does not meet identified job requirements

Mandatory training in the performance appraisal process will be provided by the Office of Human Resources for all Administrative staff and their supervisors (including Faculty who supervise Administrative staff).

PERFORMANCE APPRAISAL PROCESS

Mandatory training will be provided by the Office of Human Resources to all administrative staff and supervisors of administrative staff. New hires will also go through a training session as part of their orientation to the University.

GETTING STARTED 1ST YEAR. After conducting the performance appraisal for the current year, supervisor and employee jointly establish goals and objectives for the coming year.

| | | | | |
|--------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| 1. The supervisor observes and documents employee's performance regularly sharing feedback throughout the year. | 2. Employee reviews job analysis, making appropriate changes, and completes Performance Appraisal Form "PAF" for the previous year; using goals and objectives for year. | 3. Supervisor reviews employee's job analysis, completes "PAF" for the previous year, plans goals and objectives for the coming year. | 4. Supervisor and employee discuss the previous year's performance, current job analysis, and finalize goals and objectives for the coming year. | 5. Supervisor sends completed "PAF" and current job analysis to Human Resources. Copies of all documents are given to the employee. |
|--------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|

AT END OF NEXT YEAR

The Performance Appraisal Process cycle continues with Step #1

BOWLING GREEN STATE UNIVERSITY

ADMINISTRATIVE STAFF PERFORMANCE APPRAISAL FORM

| | | |
|-----------|--------------------|-----------------|
| Employee: | Title: | Evaluation Peri |
| | Form Completed By: | Date Form Cor |

| | |
|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | GENERAL INSTRUCTIONS The purpose of this appraisal is to evaluate employee perf |
| Step 1 - | Identify preliminary goals for discussion. Prior to meeting, employee and supervisor each shou accomplishments and be prepared to discuss these. |
| Step 2 - | Complete the employee information block at the top of thi |
| Step 3 - | Record your performance observations as well as performance information. Comm accurate, and concrete. Consideration should be given to employee's major strengths and are |
| Step 4 - | Conduct performance appraisal interview. Give consideration to changes that may be needed in t goals and objectives define success in the job and must be flexible in response to changes throughout the year, b full participation of both employee and supervisor. Keep the goals SMART -- Specific, Measurable, Attainable, the goals will be measured. Focus on measurable performance such as "deliver, develop, produce, increase, or frame. |
| Step 5 - | Provide additional relevant comments, sign, and date completed form. Consider typ would be desirable in order to fulfill the duties of this position; internal and external professional activities per students; BGSU committee work; personal goals, etc. |
| Step 6 - | Allow employee an opportunity to provide comments and have employee sign an include how supervisor could better aid employee in effectively performing job duties, what the employee ne communication with supervisor, concerns about safety, confidentiality, objectiv |
| Step 7 - | Return original completed form and current job analysis to Human Resources ; copy of the completed form. |

General

| | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| <p><u>Area 1 - Commitment to BGSU Mission, Goals, Policies & Regulations:</u> Promotes and works toward achievement of university-related goals within the framework of university policies and procedures (e.g., maintains regular and reliable attendance, enforces and complies with safety and health policies/procedures; promotes equity and diversity in the work place).</p> | <p><u>Observations:</u></p> |
| <p><u>Goals for next rating period</u></p> | |

| | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| <p><u>Area 2 - Core Professional/Technical Knowledge & Skills:</u> Understands and applies job-related knowledge and skills, policies and procedures, and technical expertise to fulfill responsibilities of the position (e.g., comprehends and applies concepts, policies and procedures and technical skills; adapts to changes in job, methods, or surroundings; originates or improves work methods).</p> | <p><u>Observations:</u></p> |
| <p><u>Goals for next rating period</u></p> | |

| | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| <p><u>Area 3 - Professional Development:</u> Maintains and updates professional knowledge and skills necessary for success in current position (e.g., participates in individual/staff training and development activities provided by unit, division, or university; attends off-campus development and educational activities contingent upon support in terms of financial resources and release time by supervisor).</p> | <p><u>Observations:</u></p> |
| <p><u>Goals for next rating period</u></p> | |

| | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| <p><u>Area 4 - Written & Oral Communication Skills:</u> Communicates effectively with supervisor, coworkers, and others (e.g., shares information, communicates job-related information, prepares written documentation and administrative procedures, facilitates and participates in meetings, prepares and delivers oral presentations).</p> | <p><u>Observations:</u></p> |
| <p><u>Goals for next rating period</u></p> | |

| | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| <p><u>Area 5 - Resource Use & Management:</u> Uses appropriate resources to increase effectiveness of unit/area and BGSU (e.g., monitors financial status of unit/area, schedules employees, prepares and interprets statistics, develops and manages budget).</p> | <p><u>Observations:</u></p> |
| <p><u>Goals for next rating period</u></p> | |

| | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| <p><u>Area 6 - Service & Quality Orientation:</u> Provides effective customer service and sets and monitors quality standards for service delivery by self and unit/area (e.g., delivers quality services in friendly and professional manner, ensures that work products such as completed forms, records, and answers to questions have no errors; modifies old and develops new programs to improve customer service or program quality).</p> | <p><u>Observations:</u></p> |
| <p><u>Goals for next rating period</u></p> | |

| | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| <p><u>Area 7 - Interpersonal Relations at Work:</u> Develops and maintains effective working relationships with supervisors, staff coworkers, and others (e.g., deals effectively with interpersonal problems at work, consults with colleagues, demonstrates loyalty, collaborates with colleagues and is able to maintain professional confidentiality).</p> | <p><u>Observations:</u></p> |
| <p><u>Goals for next rating period</u></p> | |

| | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| <p><u>Area 8 - Internal/External Relations & Service:</u> Presents a positive impression of self and university while participating in university and non-university service activities (e.g., delivers presentations and lectures to the community, networks with off-campus community leaders, participates on university and non-university committees).</p> | <p><u>Observations:</u></p> |
| <p><u>Goals for next rating period</u></p> | |

Supervisory/Management

| | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| <u>Area 9 - Human Resources Development:</u> Hires, trains, instructs and evaluates staff members (e.g., aids in selection of staff members; provides release time and financial support for development; develops and monitors performance expectations for staff members; provides continuous feedback, conducts effective performance reviews). | <u>Observations:</u> |
| <u>Goals for next rating period</u> | |

| | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| <u>Area 10 - Program Monitoring, Coordination & Management:</u> Monitors, coordinates, and directs program activities to ensure adherence to policies and procedures given available resources, and to meet short and long-term goals (e.g., ensures quality improvement in programs, reviews customers' progress and attainment of goals, collaborates with appropriate others for program modification and development). | <u>Observations:</u> |
| <u>Goals for next rating period</u> | |

| | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| <p><u>Area 11 - Supervision/Team Building:</u> Provides direction and support to individuals and teams to improve their work effectiveness (e.g., assigns tasks and responsibilities to staff/teams; ensures and monitors adequacy of resources necessary for staff/teams to accomplish their jobs; develops an atmosphere of teamwork and cooperation).</p> | <p><u>Observations:</u></p> |
| <p><u>Goals for next rating period</u></p> | |

| | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------|
| <p><u>Area 12 - Leadership & Vision:</u> Develops and implements new programs and policies in area/unit to enhance work effectiveness, customer service, and staff morale and motivation (e.g., proposes or champions new initiatives or directions to improve area/unit and university; generates employee support, enthusiasm, and trust; effectively represents area/unit on campus and in the community).</p> | <p><u>Observations:</u></p> |
| <p><u>Goals for next rating period</u></p> | |

Performance Appraisal Summary

Supervisor Summary:

Supervisor Signature:

Additional comments by employee:

Employee Signature:

Signature indicates review of evaluation has taken place, not agreement or disagreement with contents.

Second Level Supervisor's Signature: